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UNITED STATES TARIFF COMMISSION
Washington, D. C.

TRADE AGREEMENT DIGESTS

Volume XIV

PAPERS AND BOOKS

Prepared by the Tariff Commission for use in connection
with trade agreement negotiations

November 1946

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PAPERS AND BOOKS

Introduction

This volume contains approximately 65 digests of pertinent information on commodities dutiable under schedule 14 of the Tariff Act of 1930, which have been listed (up to July 15, 1946) by the Trade Agreements Committee for consideration in the proposed trade agreement negotiations with those foreign countries which have been invited to participate in the so-called "Nuclear" group. Similar volumes are being prepared by the Tariff Commission on commodities dutiable under other schedules of the tariff act which have been listed for these negotiations. Those products on the free list of the tariff act which are subject to import-excise taxes are treated as dutiable commodities and are covered by digests which appear in the volumes of the tariff schedules to which such products are most nearly related. In addition, a special volume will be issued covering all commodities on the free list other than commodities subject to import-excise taxes which have been listed for negotiation.

The scope of schedule 14 is considerably broader than is indicated by its heading in the tariff act. It covers a wide variety of paper, paper-board, and paper articles other than books, such as cartons and boxes, envelopes and bags, labels, lithographic prints, post cards, decalcomanias, maps, etchings and engravings, molded pulp goods, greeting cards, and playing cards. Cigarette paper, one of the most important classes of dutiable papers, is provided for in paragraph 1552 of the tariff act. It is therefore not considered in this volume but in volume 15, which covers items provided for in schedule 15. Also excluded are newspapers and current periodicals, manuscripts, duplex decalcomania paper, wood pulp, paper stock, and standard newsprint paper, which are imported duty free. The last named article is one of the largest United States import items.

United States production of the commodities covered by this schedule (but not including the articles entitled to free entry) averaged about 2.5 billion dollars annually for the 5-year period 1935-39. No values are available for the war years, but an average of about 3.0 billion dollars has been estimated. These data contain some duplication since they include both production of paper and of products made from paper.

Imports under this schedule amounted to about 11.5 million dollars in 1939, a value somewhat below the average for 1935-39 period which was 12.6 million dollars. In the aggregate, imports of articles under this schedule supplied considerably less than 1 percent of United States consumption although for some specific items the ratios were at considerable variance with this figure. Imports came largely from Germany, Sweden, the United Kingdom, Canada, and Japan, and consisted principally of board, wrapping paper, drawing paper, fine tissues, filter paper, hanging paper, and specialties.

United States exports of paper and paper products, excluding newsprint, have not been large, ranging from about 1 to 2 percent of total output of dutiable items. They have, however, ranged from 2 to 4 times the value of imports during the 5-year period 1935-39, and from 6 to 9 times the imports during 1940-43. The exports of dutiable paper and paper articles exclusive of cigarette paper and printed matter went principally to the United Kingdom, Canada, other British Dominions, and the Philippines. The printed matter exported went largely to Canada, the Philippines, and British possessions.

The ratio of duties collected on all imports of commodities in schedule 14 to the foreign value of such dutiable imports ranged from an average of about 24 percent in 1935 to 19 percent in 1939. The decline was principally attributable to reductions in duties through the various trade agreements but also in part to changes in both the type and prices of articles imported.

Those items under schedule 14 which are listed for consideration in the proposed negotiations and covered by the digests contained herein represent nearly 70 percent of the total value of imports of all commodities in this schedule in 1939.^{1/} Of the total imports in 1939 of articles listed for consideration, approximately 30 percent are accounted for by books and other printed or lithographed material, whereas about 15 percent more represented tissue and thin papers, 12 percent photographic papers, 10 percent uncoated book paper, 7 percent pulpboard and paperboard not processed, 5 percent manufactures of pulp and papier-mache, and 4 percent filtering paper.

Explanatory Notes

The digests presented herein have been kept as brief as possible and contain only the data most pertinent for an understanding of the international competitive situation with respect to the various products. It was obviously impractical to include all the facts pertaining to the many commodities listed for consideration. Supplementing the data given in the digests, and available for use in the negotiations, is the extensive information contained in the files of the Commission and its numerous published reports, as well as the knowledge and experience of its staff.

In many instances, where a number of closely related commodities are listed for consideration, a Summary Digest is given in addition to separate digests on each of the listed items. The Summary Digest gives statistics of production, exports, and imports for the group of related products as a whole, describes the interrelationships among the several products, and discusses general competitive problems. In some cases the Summary Digest covers items which are not listed for consideration in the proposed negotiations. Such unlisted items have been included in order to give a more complete picture of the production and trade in all the related products of an industry; they are not covered by separate digests. Occasionally the statistics of production given in the Summary Digest relate to the product in both unfabricated and fabricated forms, resulting in some duplication. Where duplication is significant, attention is called to that fact.

Most of the digests give statistics of United States production, exports, and imports (total and by principal sources) for the three pre-war years, 1937, 1938, and 1939 and for one war year, 1943. In the case of some commodities the statistics cover a much longer period. Where statistics of production or of exports of a particular commodity are not available, estimated figures, or some other indication of the relative importance of production and exports as compared with imports are given when possible. Frequently a digest covers more than one statistical import class. In such cases, if the imports are significant, a supplementary table is given, showing for 1939, or some other representative prewar year, statistics of United States imports by individual statistical class, by principal country of origin. Where exports under Lend-Lease are substantial, as well as where imports free for government use or as an act of international courtesy or free under special provisions of the Tariff Act of 1930 are substantial, they are indicated in footnotes to the tables.

^{1/} Items which in 1939 accounted for 54 percent of the total value of imports under schedule 14 were subject to reduced rates of duty provided in trade agreements in effect on April 1, 1945.

Import values are in practically all cases foreign values, i.e., they do not include duties, transportation costs, and certain other charges incident to the shipment of products from the foreign country to the United States. These values, therefore, are not strictly comparable with the values shown for United States production (which are usually the sales value of the product at the plant) or for exports (which represent the actual selling price including inland freight and other charges to the port of exportation).

The countries which are the principal sources of imports are generally listed in the table in the order of the magnitude (by value) of their imports in 1939; and names of the proposed negotiating countries are shown in capital letters.

The digests show for each item the rate of duty provided in the Tariff Act of 1930 and the 1945 (January 1) rate. Changes in the duty since the act of 1930 became effective are shown in detail in footnotes. When it is significant, the ad valorem equivalent (or the specific equivalent) of each rate of duty is given in a general note following the section on tariff rates.

In the case of many of the schedules, rates of duty on certain commodities were reduced by the trade agreements with the United Kingdom and Canada effective January 1, 1939. The economic conditions in these countries and throughout the world were so disturbed in 1939, as the result of preparations for and actual outbreak of war, that the statistics of United States imports for that year cannot be taken as indicating what would have been the effects of these duty reductions under peacetime conditions; the import data for the war years are still less indicative of what would have been those effects.

BOOK AND PRINTING PAPER, NOT COATED, N.S.P.F.

Stat. import classes (1939): 4712.2, 4712.3, 4712.5

United States production, exports, and imports, 1936-44

Year	Production ^{1/}	Domestic exports	Imports for consumption from--			
			ALL countries	CANADA	Finland	Newfoundland and Labrador
Quantity (short tons)						
1936 ----	1,621,837	9,048	10,528	8,535	977	-
1937 ----	2,013,855	14,961	15,407	12,537	1,271	-
1938 ----	1,752,465	9,176	9,508	7,563	1,108	-
1939 ----	2,022,272	15,387	13,408	10,472	831	93
1940 ----	2,030,876	42,646	16,662	15,904	85	84
1941 ----	2,443,567	41,406	28,474	27,301	-	1,141
1942 ----	1,992,326	21,439	23,238	27,466	-	772
1943 ----	1,881,056	22,415	23,329	23,202	-	127
1944 ----	1,723,929	22,022	27,246	26,919	-	327
Value (dollars)						
1936 ----	n.a.	997,572	455,347	338,573	46,092	-
1937 ----	174,960,274	1,822,130	715,428	513,624	66,880	-
1938 ----	n.a.	1,124,762	532,512	358,989	60,656	-
1939 ----	171,028,563	1,830,813	729,624	496,252	36,816	4,502
1940 ----	n.a.	6,222,246	823,247	773,425	3,615	4,106
1941 ----	n.a.	6,407,633	1,460,334	1,403,573	-	51,986
1942 ----	n.a.	3,812,677	1,492,376	1,456,604	-	35,772
1943 ----	n.a.	3,850,937	1,313,416	1,306,311	-	7,105
1944 ----	n.a.	4,188,123	1,658,947	1,637,655	-	21,292

^{1/} Production figures adjusted to exclude machine-coated book paper.

Source: Official statistics of the U. S. Department of Commerce, except as noted.

Item	United States tariff		Proposed negotiating country
	Act of 1930	1945 rate	
Par. 1401			
Book and printing papers, not coated, n.s.p.f.	1/4¢ lb. + 10% ad val.	1/5¢ lb. + 5% ad val.	CANADA

^{1/} Trade agreement with Canada effective January 1939.

Note.- The duty on total imports was equivalent to 21 percent of the foreign value in 1937, to 19 percent in 1938, to 13 percent in 1939, and to 12.1 percent in 1943.

Comment

Two principal classes of uncoated book and printing papers are recognized, namely, those having a content of less than 50 percent groundwood, commonly known as uncoated book papers, and those containing 50 percent or more of groundwood, known as groundwood printing and specialty papers. In many instances these two classes of paper are used interchangeably for various kinds of printed matter, but the former are customarily employed where better appearance and greater permanence are desired. Some grades are used for envelopes, tablets, posters, mimeographing,

BOOK AND PRINTING PAPER, NOT COATED, N.S.P.F.--Continued

box lining, and wall paper, and considerable quantities are used as stock for coating or converting into other paper articles. So-called "text paper," included under the provisions of this paragraph, is a rag printing paper made in mills producing writing and other fine papers.

Uncoated printing papers are produced largely in the Northeastern and Lake States, eight of these States ordinarily making over 80 percent of the total United States output. The major part of the printing and converting industries using this paper is also in this area. The 13 Canadian mills listed as making one or more kinds of uncoated printing paper are all in Ontario and Quebec, relatively near the important United States markets.

The war had little permanent effect on the uncoated printing paper industry in the United States. Temporarily, however, its output was affected by Government restrictions placed upon the use of pulpwood by reason of a shortage of labor, and upon the use of pulp by reason of necessary allocations to war uses.

The gradual shrinkage of the newsprint industry in the United States since 1926 has resulted in the shift of a number of mills from the production of newsprint to the production of groundwood printing and book papers. This trend continued throughout the war period but at a reduced rate.

Imported uncoated printing and book papers are used for the same purposes as, and are competitive with, corresponding types produced domestically. Most of the imported papers are in the lower-priced group of groundwood printing and specialty papers and come mainly from Canada. Higher priced papers are imported in small volume and these come largely from European sources and are used principally for special printing. Total imports in the 3 years 1937-39 were equal to about two-thirds of 1 percent of the domestic production.

Exports for the most part have consisted of the better grades of book paper and have been shipped to widely scattered markets throughout the world.

United States imports of book paper were larger in 1941-45 than in prewar years owing principally to (1) the heavy demand by the publishing industry which could not be met by domestic producers operating under wartime restrictions and (2) the reduction in duty, effective January 1939, resulting from the trade agreement with Canada.

PULPBOARD IN ROLLS FOR WALLBOARD

Stat. import classes (1939): 4730.0, 4730.2

United States production, exports, and imports, 1937-39 and 1943

Year	Production	Domestic exports	Imports for consumption from--			
			All countries	CANADA		
	Quantity (short tons)					
1937 ---	Not	Not	11,505	11,505		
1938 ---	avail-	avail-	9,812	9,812		
1939 ---	able	able	10,085	10,085		
1943 ---	(see text)	(see text)	28,307	28,307		
	Value (dollars)					
1937 ---	Not	Not	492,011	492,011		
1938 ---	avail-	avail-	385,554	385,554		
1939 ---	able	able	347,433	347,433		
1943 ---	(see text)	(see text)	1,264,359	1,264,359		

Source: Official statistics of the U. S. Department of Commerce.

ItemUnited States tariffProposed
negotiating
country

<u>Act of</u>	<u>1945</u>
<u>1930</u>	<u>rate</u>
<u>Percent ad valorem</u>	

Par. 1402

*** pulpboard *** not plate
finished, supercalendered,
or friction calendered,
laminated by means of an
adhesive substance, coated,
surface stained or dyed,
lined or vat-lined, embossed,
printed, decorated, or orna-
mented in any manner ***:

Pulpboard in rolls for use in
the manufacture of wallboard ---

10

1/5

CANADA

Par. 1413

Pulpboard in rolls for use in
the manufacture of wallboard,
surface stained or dyed, lined
or vat-lined, embossed, or
printed -----

30

1/15

do.

1/ Trade agreements with Canada, effective January 1936 and January 1939.

Comment

Pulpboard for use in the manufacture of wallboard is made mainly from mechan-
ically ground wood and repulped waste paper, although some chemical wood pulp is
used depending upon the quality of pulpboard required. The imported pulpboard
here under consideration comes exclusively from Canada. The material is cut into
sheets which are used as layers or plies in building up the finished wallboard.
Practically all, if not all, of the imports have consisted of shipments to one
domestic wallboard manufacturer from its subsidiary Canadian plant. The imports
dutiable under paragraph 1413 are somewhat more processed than those dutiable under

PULPBOARD IN ROLLS FOR WALLBOARD—Continued

paragraph 1402 and are used for the outer or face plies of finished wallboard. Statistics do not disclose any imports of laminated fiber wallboard (the finished product in the manufacture of which the imports under consideration are used); such wallboard would probably be dutiable under paragraph 1413 at \$14.50 a ton of 2,000 pounds, but not less than 15 percent nor more than 30 percent ad valorem.

Fiber wallboard of the type made from the pulpboard imported in rolls is produced in the United States by about six companies with plants located principally in the Lake and Northeastern States. Except for the wallboard made by the company which imports pulpboard in rolls from Canada, the domestic production of fiber wallboard is for the most part by plants which make their own pulp. It is estimated that from 60,000 to 75,000 tons of domestic wood pulp is used annually in the manufacture of fiber wallboard. Data on the domestic production of fiber wallboard are not available, but it is estimated that that made from imported pulpboard accounts for about one-fourth to one-third of the total domestic production.

Imports of pulpboard in rolls for the manufacture of wallboard increased substantially during the war years. This was because of the heavy demand for wallboard for construction of military installations here and abroad.

Exports of pulpboard in rolls for use in the manufacture of wallboard are not separately shown in United States statistics. Canadian official statistics, however, show imports of the commodity from the United States ranging from 2,739 short tons valued at \$98,950 ¹/₂ in 1938 to 6,003 short tons valued at \$346,468 ¹/₂ in 1944. Total imports into Canada each year have been from the United States.

United States imports of pulpboard in rolls for use in the manufacture of wallboard are probably governed more by the competition between different domestic manufacturers of wallboard of various types in this country than by the existing rates of duty.

Pulpboard in rolls for use in the manufacture of wallboard: United States imports for consumption, by kinds and source, 1939

Kind	Total value	Source
Not surface stained, lined, nor plate finished	\$187,127	CANADA
Surface stained, lined, or plate finished	160,306	CANADA

Source: Official statistics of the U. S. Department of Commerce.

LEATHER BOARD, OR COMPRESS LEATHER, NOT PROCESSED

Stat. import class (1939): 474.13

United States production, exports, and imports, 1937-39 and 1943

Year	Production	Domestic exports	Imports for consumption from--			
			All countries	CANADA	Sweden	Germany <u>1/</u>
Quantity (short tons)						
1937 -----	27,174	Not	n.a.	-	-	-
1938 -----	18,355	avail-	<u>2/</u>	-	<u>2/</u>	-
1939 -----	25,714	able	1,504	703	790	11
1943 -----	<u>3/</u> 40,000		966	966	-	-
Value (dollars)						
1937 -----	2,238,888	Not	n.a.	-	-	-
1938 -----	n.a.	avail-	<u>2/</u>	-	<u>2/</u>	-
1939 -----	1,978,283	able	111,034	70,745	39,746	543
1943 -----	n.a.		96,725	96,725	-	-

^{1/} Includes Austria beginning 1938. ^{2/} Negligible (220 pounds valued at \$6).^{3/} Estimated.

Source: Official statistics of the U. S. Department of Commerce, except as noted.

ItemUnited States tariffProposed negotiating country

Act of 1945
1930 rate
Percent ad valorem

Par. 1402

*** Leather board or compress leather, not plate finished, supercalendered or friction calendered, laminated by means of an adhesive substance, coated, surface stained or dyed, lined or vat-lined, embossed, printed, decorated, or ornamented in any manner, nor cut into shapes for boxes or other articles and not specially provided for, ***

10 ^{1/} 10

CANADA

^{1/} Bound in trade agreements with Sweden, effective August 1935, and Finland, effective November 1936.

Comment

Genuine leather board is a solid fibrous sheet made of pulped scrap leather with latex or other sizing material. Imitation leather board, heeling board, counter board, and other solid fiber shoe boards are made of chemical wood pulp, waste paper, and varying proportions of scrap leather fiber, latex, sizing materials, and chemicals. All of these boards containing a major proportion of scrap leather fiber are usually classed as leather board or compress leather.

Genuine leather board is used for heels (except top lifts), heel bases, and shanks in shoes, and for gaskets, dust guards, and other industrial purposes. Imitation leather board, counter board, heeling board, and similar solid fiber shoe boards are used for counters, inner soles, stiffeners, toe reinforcements, and other shoe or slipper parts not customarily exposed to dampness, and also for

LEATHER BOARD, OR COMPRESS LEATHER, NOT PROCESSED-Continued

luggage. All of these boards are compact and range from about 35 to 350 thousands of 1 inch in thickness. All are dutiable at 10 percent under the provisions of paragraph 1402 if they are not plated, splendered, laminated, coated, lined, embossed, or otherwise processed after manufacture.

Leather board and imitation leather boards are manufactured by 19 or 20 concerns all located in seven States east of the Mississippi and north of the Ohio River. The larger part of the domestic production is used in the manufacture of shoes and slippers, and most of the remainder in the manufacture of low-priced luggage and imitation leather goods.

Imports from Canada have consisted of genuine leather board; those from Sweden consist of a type of shoe board made almost entirely of wood pulp. The imported products are used for the same purposes as the leather board produced in the United States.

Owing to the greatly increased demand for leather by the armed forces, the use of leather board as a substitute for leather increased substantially during the war, especially for civilian articles.

Exports of genuine leather board are negligible. Small quantities of other shoe boards for use in making cheap footwear have been exported to various foreign markets but only in relatively small quantities.

STRAWBOARD, NOT PROCESSED

Stat. import classes (1939): 474.14 and 4717.3

United States production, exports, and imports, 1937-39 and 1943

Year	Production <u>1/</u>	Domestic exports	Imports for consumption from--			
			All countries	NETHERLANDS	Belgium	
Quantity (short tons)						
1937 -----	465,000	Not	2,123	2,049	74	
1938 -----	n.a.	avail-	318	318	-	-
1939 -----	425,000	able <u>2/</u>	388	388	-	-
1943 -----	410,000		<u>2/</u> 1,345	-	-	
Value (dollars)						
1937 -----	17,750,000	Not	51,612	49,897	1,715	
1938 -----	n.a.	avail-	7,180	7,180	-	-
1939 -----	12,700,000	able <u>2/</u>	7,822	7,822	-	-
1943 -----	n.a.		<u>2/</u> 71,164	-	-	

1/ Estimated. 2/ Probably negligible. 3/ From Canada.

Source: Official Statistics of the U. S. Department of Commerce, except as noted.

ItemUnited States tariffProposed negotiating country

Act of 1945
1930 rate

Percent ad valorem

Par. 1402

Strawboard 12 one-thousandths of one inch or more in thickness, not plate finished, supercalendered, laminated, coated, stained, embossed, or otherwise further processed -----

10 2/ 10

NETHERLANDS

Par. 1409

Strawboard and straw paper less than 12 one-thousandths of one inch but not less than 8 one-thousandths of one inch in thickness, n.s.p.f. 1/ -----

30 3/ 15

NETHERLANDS

1/ For tariff purposes, strawboard within the thickness range specified is dutiable as wrapping paper, n.s.p.f.

2/ Rate bound, trade agreements with Sweden effective August 1935 and with Finland, November 1936.

3/ Trade agreement with the Netherlands, effective February 1936.

Comment

Strawboard is a coarse board made of pulp produced by the chemical and mechanical treatment of straw from wheat, rye, barley, oats, or other plants. It is rigid, hard, usually yellow or brown in color, can be made on any type of paper machine, and will not take a high finish. It may range in thickness from 6 to 90 one-thousandths of one inch, the thicker boards often being lined with book or other paper before final use.

Because of its rigidity and resistance to crushing, this board is used for boxes, tablet backs, spirally wound tubes, book bindings, separators, and in laminating. Strawboard 9 one-thousandths of one inch thick is used in large quantities for corrugating and to be further processed in making the board from which shipping containers are fabricated; it is also used in wrapping fragile

STRAWBOARD, NOT PROCESSED--Continued

merchandise for shipment. Actual and potential substitutes for strawboard of this type in many of its uses are 9-point chestnut board, krait board, bogus corrugating, and news and chip corrugating, all of which are or have been made in the United States.

Strawboard is produced in from 25 to 30 mills in the United States, probably not less than 80 percent of the total domestic output being made in the region from Ohio to Kansas and north to Michigan and Minnesota. Small quantities are made in California and the northeastern States. The principal consumers are in or near the localities in which the mills are situated.

Imports of strawboard have been divided between the so-called "9-point" board for ultimate conversion into corrugated containers and the heavier boards. Although Belgium has supplied a small part of these imports, the board from that country was almost exclusively of the lighter weights for corrugating. All imports of strawboard into the United States from Europe ceased after 1939. The unit foreign value of the imported board, as calculated from official figures, was about 30 percent less than that of similar board made in the United States. The imported product competed in price but not always in quality with domestic board in the box-manufacturing centers along the North Atlantic seaboard. During the war a quantity of corrugating material made from the same materials as newsprint paper plus varying quantities of 9-point strawboard was imported from Canada to supplement the insufficient domestic supply of straw, chestnut, and other corrugating materials required for war uses. Except for the period of the war, competition from these imported materials has been of little consequence elsewhere than in or near seaboard centers.

Exports of strawboard are not shown separately in the statistics but are believed to have been negligible.

SHEATHING AND ROOFING PAPERS AND FELTS

Stat. import class (1939): 479.70

United States production, exports, and imports, 1937-39 and 1943

Year	Production	Domestic exports	Imports for consumption from—			
			All countries	UNITED KINGDOM	Canada	
	Quantity (short tons)					
1937 —	608,086	7,326	380	635	149	
1938 —	570,454	7,518	694	509	104	
1939 —	659,090	6,778	544	472	47	
1943 —	877,582	<u>1/</u> 8,008	1,039	875	82	
	Value (dollars)					
1937 —	32,630,126	527,595	70,758	55,845	5,977	
1938 —	n.a.	576,278	59,122	46,252	4,172	
1939 —	31,105,249	446,438	46,753	42,821	1,714	
1943 —	n.a.	<u>1/</u> 747,848	144,418	134,635	4,886	

1/ Includes 1,314 short tons valued at \$129,989 exported under lend-lease.

Source: Official statistics of the U. S. Department of Commerce.

Item	United States tariff		Proposed negotiating country
	Act of 1930	1945 rate	
Par. 1402	Percent ad valorem		
Sheathing paper, roofing paper, deadening felt, sheathing felt, roofing felt or felt roofing, whether or not saturated or coated	10	<u>1/</u> 10	UNITED KINGDOM
<u>1/</u> Rate bound by trade agreement with the United Kingdom, effective January 1939.			

Comment

Sheathing paper is a compact heavy paper, usually well sized, for use between the sheathing and siding or in the flooring of buildings to keep out wind and dust. Roofing felt is a soft, porous paper made of mixed cotton and wool rags and waste paper. Its quality depends on the kind and quantity of rags used. Its weight may range from 15 to 110 pounds per 480 square feet. Roofing paper is usually synonymous with prepared roofing, and includes roofing felt impregnated with asphalt and coated with ground slate or talc. Roofing paper also includes strip asphalt shingles and built-up roofing made from the same materials.

All of these felts and papers are used in construction and repair of dwellings, warehouses, storage depots, garages and hangars, industrial operations, and farm buildings of all kinds. The prepared roofings are sold in rolls and the shingles in bundles, in both instances sufficient in quantity to cover 100 square feet of surface. Dry felts and sheathing paper are sold in rolls of different sizes.

Building papers, sheathing felts, and roofing papers and felts, both dry and saturated, are made by about 70 mills in 25 States, the greatest concentration being in New York, New Jersey, Pennsylvania, California, and the Lake States.

SHEATHING AND ROOFING PAPERS AND FELTS--Continued

The production statistics above contain data on only the dry papers and felts because of the obvious duplication if saturated and coated roofings were included. Production of asphalt roofings, shingles, and saturated building papers for which part of the dry felts and papers were used as a base have since 1938 been valued at between 75 and 100 million dollars annually. The large increase in production after 1939 was caused by the demand for these materials for use in the construction of barracks, temporary housing, storage dumps, and other buildings by and for the armed forces in the United States and in foreign countries.

Imports of these products into the United States have been limited almost exclusively to dry felts and papers because the asphalt impregnated and coated materials cannot be stored or shipped any great distance except at considerable extra expense and with considerable loss. The only impregnated article of import has been a special sheathing felt made of waste flax fiber originating in the United Kingdom and used in ship construction. The marked growth of imports during the war period was due to greatly increased requirements for war uses and restrictions on the domestic supply caused by manpower shortages.

Exports have been limited largely to dry felts and papers because of extraordinary storage and transportation problems involved in shipping prepared roofings. Foreign markets for these materials have been widely scattered, the more important being in Latin America.

MANUFACTURES OF PULP, NOT SPECIALLY PROVIDED FOR

Stat. import class (1939): 4786.5

United States production, exports, and imports, 1937-39 and 1943

Year	Production	Domestic exports <u>1/</u>	Imports for consumption from--				
			All countries	UNITED KINGDOM	Germany <u>2/</u>	Nether- lands	Japan
			Value (dollars)				
1937	4,041,554	Not avail- able	29,549	8,875	7,929	-	3,681
1938	n.a.		21,589	6,098	11,818	458	552
1939	3,587,393		13,768	5,857	5,092	1,640	21
1943	n.a.		<u>3/</u> 26,889	17,734	3	-	-

^{1/} Exports are probably smaller than imports.^{2/} Includes Austria beginning 1938. ^{3/} Includes \$9,151 from Canada.

Source: Official statistics of the U. S. Department of Commerce.

ItemUnited States tariffProposed
negotiating
country

<u>Act of</u>	<u>1945</u>
<u>1930</u>	<u>rate</u>
<u>Percent ad valorem</u>	

Par. 1403

Manufactures of pulp, n.s.p.f. -----	30	30	UNITED KINGDOM
--------------------------------------	----	----	----------------

Comment

Manufactures of pulp, n.s.p.f., include a variety of pressed and molded articles such as dishes, toys, coasters, trays, advertising novelties and displays, decorative panels, extraction thimbles, and containers. The most important items are dishes, toys, and advertising goods.

Production of molded pulp goods in the United States is confined to 10 or 11 concerns, a few of which make articles from materials other than pulp. All of these concerns are located in the Northeastern and Lake States. United States consumption of articles made from pulp has ranged in recent years from about 3 to 4 million dollars annually and over 99 percent of the requirements has been supplied by domestic producers.

Imports of pulp goods consist mainly of beer pads, extraction thimbles, decorative articles, ornaments, and novelties which do not compete with the major part of the domestically made goods.

Exports are not separately reported but are estimated to be small in both quantity and value.

THE FIRST PART OF THE BOOK, OF COURSE

THE FIRST PART OF THE BOOK, OF COURSE		THE SECOND PART OF THE BOOK, OF COURSE	
1	2	3	4
5	6	7	8
9	10	11	12
13	14	15	16
17	18	19	20
21	22	23	24
25	26	27	28
29	30	31	32
33	34	35	36
37	38	39	40
41	42	43	44
45	46	47	48
49	50	51	52
53	54	55	56
57	58	59	60
61	62	63	64
65	66	67	68
69	70	71	72
73	74	75	76
77	78	79	80
81	82	83	84
85	86	87	88
89	90	91	92
93	94	95	96
97	98	99	100

THE SECOND PART OF THE BOOK, OF COURSE
THE THIRD PART OF THE BOOK, OF COURSE

THE FOURTH PART OF THE BOOK, OF COURSE
THE FIFTH PART OF THE BOOK, OF COURSE
THE SIXTH PART OF THE BOOK, OF COURSE

THE SEVENTH PART OF THE BOOK, OF COURSE
THE EIGHTH PART OF THE BOOK, OF COURSE
THE NINTH PART OF THE BOOK, OF COURSE

THE TENTH PART OF THE BOOK, OF COURSE
THE ELEVENTH PART OF THE BOOK, OF COURSE
THE TWELFTH PART OF THE BOOK, OF COURSE

THE THIRTEENTH PART OF THE BOOK, OF COURSE
THE FOURTEENTH PART OF THE BOOK, OF COURSE
THE FIFTEENTH PART OF THE BOOK, OF COURSE

THE SIXTEENTH PART OF THE BOOK, OF COURSE

THE SEVENTEENTH PART OF THE BOOK, OF COURSE
THE EIGHTEENTH PART OF THE BOOK, OF COURSE
THE NINETEENTH PART OF THE BOOK, OF COURSE

THE TWENTIETH PART OF THE BOOK, OF COURSE
THE TWENTY-FIRST PART OF THE BOOK, OF COURSE
THE TWENTY-SECOND PART OF THE BOOK, OF COURSE

THE TWENTY-THIRD PART OF THE BOOK, OF COURSE
THE TWENTY-FOURTH PART OF THE BOOK, OF COURSE
THE TWENTY-FIFTH PART OF THE BOOK, OF COURSE

THE TWENTY-SIXTH PART OF THE BOOK, OF COURSE

TISSUE AND SIMILAR PAPERS, EXCEPT CIGARETTE PAPER (SUMMARY DIGEST)
(See separate digests which follow on the principal kinds of papers)

Stat. import classes (1939): 4728.01,4728.02,4729.01,4729.02; 4728.11,4729.11;
4728.21,4728.22,4729.21,4729.22; 4728.31,4728.32,4729.31,4729.32; 4728.41,
4729.41; 4728.51,4728.52,4729.51,4729.52;4728.61,4728.62,4729.61,4729.62;
4728.71,4728.72,4729.71,4729.72,4729.91; 4728.81,4728.82,4729.81,4729.82

Table 1.- United States production, exports, and imports for consumption, 1939

Item	Quantity	Value	Average value per pound
	1,000 pounds	1,000 dollars	Cents
Production:			
All weights <u>1/</u> -----	1,314,000	60,500	4.6
Under 10 pounds per ream <u>2/</u> -----	795,000	39,000	4.9
Exports, all weights <u>1/</u> -----	23,800	2,255	9.5
Imports, dutiable under par. 1404, weighing under 10 pounds per ream <u>3/</u> :	1,802	928	51.5
Ratio of imports to production:	Percent	Percent	
All weights -----	0.14	1.53	-
Under 10 pounds per ream -----	.23	2.38	-

1/ After deducting from official statistics of the U. S. Department of Commerce (which include cigarette paper) approximate data for cigarette paper, as reported, for quantity, by the Tissue Association and as estimated, for value, by the Tariff Commission.

2/ Estimates by the Tissue Association, computed on basis of percentages shown in table 2.

3/ Official statistics of the U. S. Department of Commerce. Include also india and bible paper weighing 10-20½ pounds per ream (a relatively small quantity).

Note.- For rates of duty on the papers here considered see table 6 of this Summary Digest.

Scope of this summary

Numerous kinds of tissue and other thin papers, of diverse compositions and finish, are produced for different uses. Some imports of these papers, such as cigarette, onionskin, imitation onionskin, and filter papers, are specifically provided for in paragraphs of the tariff act other than 1404, and in addition some of these papers, if coated or impregnated (such as stencil and waxed paper) are also specifically provided for elsewhere. Most types of tissue and thin papers, however, if weighing less than 10 pounds to the ream of 288,000 square inches are dutiable under paragraph 1404. Among these are several specifically designated in that paragraph, namely, stereotype, copying, condenser, carbon (coated or uncoated), bibulous paper, pottery paper, and paper for waxing. Other thin papers are provided for in the paragraph under the provision covering "all papers similar to any of the foregoing not specially provided for." In addition, india and bible papers weighing up to 20½ pounds to the ream are dutiable under paragraph 1404. Tissue paper weighing 10 pounds or more per ream (except india and bible paper) is not dutiable under this paragraph. It would enter under one or more other paragraphs, the rates of which, as regards the lower-priced papers, are much lower than the rates under paragraph 1404.

Although the items listed for negotiation under paragraph 1404 do not include all tissue papers covered by that paragraph, it is necessary at the outset to present a general discussion regarding tissue and similar papers as a group.

TISSUE AND SIMILAR PAPERS, EXCEPT CIGARETTE PAPER-Continued

Comparison of production, exports, and imports

Table 1, which excludes cigarette paper,^{1/} compares the imports of tissue paper dutiable under paragraph 1404 with the total domestic production of tissue paper of all weights, and with the estimated production which consists of papers weighing less than 10 pounds per ream, the limit of weight for papers dutiable under paragraph 1404 (except as regards india and bible paper). It also shows data for exports (all weights), which are not closely comparable with imports.

This table shows that in 1939 imports of tissue paper, dutiable under paragraph 1404, were equivalent, in weight, to 0.14 percent of the total domestic production (excluding cigarette paper) of all weights. In terms of value (using foreign, not duty-paid, value for imports), the ratio of imports to production was 1.5 percent, the average unit value of imports being about 10 times that of domestic production. Excluding from the domestic production paper weighing 10 pounds or more per ream, the ratio of imports to production was 0.23 percent in quantity and 2.4 percent in value.

Exports of tissue paper (all weights, excluding cigarette paper but including some crepe paper) were about 13 times as great as imports under paragraph 1404, in weight, and about $2\frac{1}{2}$ times as great in value. Exports are far lower than imports in average unit value.

Table 2 shows a break-down of United States production by types. All of the imports are high-grade papers. The domestic production of types classified as high grades, deducting the approximate production of cigarette paper, in 1939 was about 17.6 million pounds (all of this weighed less than 10 pounds per ream). Total imports (as shown by table 1) were 1.8 million pounds, or somewhat over 10 percent of the figure for domestic production of high grades. In terms of value the ratio of imports to domestic production of high-grade tissue papers is much higher, since the imports have a much higher average unit value than the domestic production even of the papers classed as high grade. Even on the basis of foreign value (not duty-paid value) the ratio of imports to domestic production of high-grade papers (other than cigarette paper) was about 23 percent in 1939.

^{1/} The prewar situation regarding cigarette paper differed greatly from that regarding other tissue papers. Cigarette paper was dutiable at 45 percent ad valorem (the rate having been reduced from 60 percent in the trade agreement with France in 1936). France was the dominant world producer of cigarette paper. Before 1939 imports of cigarette paper were several times greater than domestic production, and were about 10 times greater (in quantity) than total imports of tissue papers dutiable under paragraph 1404. This situation changed somewhat in 1939, since in September of that year (just before the outbreak of war in Europe) a large new cigarette-paper plant (jointly owned by leading American cigarette companies) began operation, using as material byproduct flax straw. Even in 1939, principally as the result of the opening of this plant, domestic production of cigarette paper was three times greater than the average for the five preceding years. Imports of cigarette paper continued practically unchanged during 1939, but thereafter, as war shut off access to French supplies, the imports dwindled to insignificant figures, while the domestic production continued to increase greatly, becoming sufficient to provide both for increasing domestic consumption and for large exports. Cigarette paper is covered by a separate digest under paragraph 1552.

TISSUE AND SIMILAR PAPERS, EXCEPT CIGARETTE PAPER-Continued

Table 2.- Tissue paper: Domestic production (all weights), by types, 1939

Type	Quantity	Value	Average value per pound	Proportion (by weight) weighing less than 10 pounds per ream ^{1/}
	1,000 pounds	1,000 dollars	Cents	Percent
High grades (cigarette, condenser, carbon, etc.) -----	34,588	\$8,399	24.2	100.0
Cigarette paper ^{2/} (approx.)----	17,000	4,400	3/	100.0
Other high grades (approx.)----	17,600	4,000	3/	100.0
Medium and low grades, total ----	1,296,858	56,131	4.3	
Waxing (up to 18 pounds) -----	78,294	3,875	4.9	51.0
Wrapping (up to 18 pounds) ----	112,526	6,908	6.2	89.0
Toweling -----	258,210	9,156	3.5	-
Toilet tissue -----	570,170	21,358	3.8	90.0
Napkin stock -----	140,196	6,594	4.7	-
Pattern tissue -----	4,610	390	8.5	100.0
Sales-book tissue -----	4,638	372	8.0	4/
Carpet twisting -----	14,610	1,075	7.4	100.0
Other -----	113,604	6,403	5.6	4/ 89.0
Grand total -----	1,331,446	64,531	4.7	61.0
Total excluding cigarette paper -----	1,314,000	60,500	4.4	60.5

^{1/} Percentages estimated by the Tissue Association.

^{2/} Quantity as reported by Writing Paper Manufacturers Association; values estimated by Tariff Commission.

^{3/} Not computed, since estimates are approximate only.

^{4/} Sales-book tissue included in "other."

Source: Bureau of the Census, 1939, except as noted.

In recent prewar years there were no imports whatever of tissue paper comparable with any of the classes of domestic production grouped as "medium and low grades" in table 2. Well over half of the total domestic production of these medium and low grades consists of papers weighing less than 10 pounds per ream, and therefore subject to the protection of the duty provided in paragraph 1404. Although all of the towel and all of the napkin stock produced weighs more than 10 pounds per ream, the great bulk of the other medium- and low-grade papers (including the bulk of the largest item, toilet paper stock) consists of the lighter weight papers.

Production of medium- and low-grade tissues in this country is on a mass basis and at low cost. No foreign country produces tissue paper in quantities even distantly approaching the quantities here produced. A further fact which would tend to prevent imports of certain major kinds of tissue paper is that economical operation requires that they be converted into finished forms (rolls, cut sheets, etc.) by substantially continuous processes, and hence in the same mills which make the paper. ^{1/}

^{1/} It may be noted that imports of tissue paper in these finished forms are dutiable at 35 percent ad valorem (par. 1413); the imports have been nil or virtually nil.

TISSUE AND SIMILAR PAPERS, EXCEPT CIGARETTE PAPER-Continued

Summary of imports by weight and value brackets

Table 3 summarizes, by weight and price brackets, the foreign value of the imports of all tissue paper covered by paragraph 1404, including those papers which are not listed for negotiation. The items not so listed are copying and bibulous papers valued at over 15 cents per pound.

Table 3.- Tissue paper: Imports of all classes, whether or not a proposed item for negotiation, 1937-39 and 1943 ^{1/}

(In thousands of dollars)				
Item	1937	1938	1939	1943
Imports (foreign value), total -----	1,116	806	928	319
Weighing less than 6 pounds per ream,				
total -----	838	630	673	182
Valued at--Not over 15 cents per pound :	<u>2/</u>	<u>2/</u>	None	None
Over 15 cents per pound ----- :	<u>2/</u>	<u>2/</u>	673	182
Weighing 6 to 10 pounds per ream, ^{1/} total :	278	176	255	137
Valued at--Not over 15 cents per pound :	<u>2/</u>	<u>2/</u>	<u>3/</u>	2
Over 15 cents per pound ----- :	<u>2/</u>	<u>2/</u>	255	135
Total subject to negotiation -----	701	451	632	309
Total not subject to negotiation -----	415	355	296	10

^{1/} Includes india and bible paper weighing 10 pounds or more but less than 20 ¹/₂ pounds per ream.

^{2/} Not available; classification established in 1939; probably very few, if any, imports had a value of less than 15 cents per pound. ^{3/} Less than \$500.

Source: Official statistics of the U. S. Department of Commerce.

In terms of value, from two-thirds to over three-fourths of prewar imports under paragraph 1404 consisted of papers weighing less than 6 pounds per ream. There were practically no imports, in either of the weight brackets, of tissue paper valued at less than 15 cents per pound, even after the duty on these classes was reduced by 50 percent in the 1939 trade agreement with Canada.

Imports by class and country of origin

The largest imports of tissue paper (table 4) under paragraph 1404 are those of carbon paper. The second largest imports are those of copying paper valued at over 15 cents per pound; this type comes principally from Japan and is not listed for the proposed negotiations. Bibulous paper valued at over 15 cents per pound, also not listed for negotiation, is a relatively minor import item; it likewise comes chiefly from Japan. These two items not listed for negotiation accounted, in value, in 1939 for approximately one-third of United States imports of all tissue paper weighing less than 10 pounds per ream. In other classes of tissues the United Kingdom, Finland, and Italy are major suppliers.

All the classes of paper shown in table 4 except waxing paper (of which there have been no imports) and paper n.s.p.f. are by nature high-priced specialties, the imports ranging in average group value from 40 cents to nearly \$1 per pound (foreign value). Imports of the "n.s.p.f." class also have actually been high-priced papers, since imports of cheap papers which would be enterable under this class are precluded by the duty.

TISSUE AND SIMILAR PAPERS, EXCEPT CIGARETTE PAPER-Continued

Table 4.- Tissue paper, weighing less than 10 pounds per ream, dutiable under paragraph 1404: 1/ United States imports in 1939, by types distinguished in trade statistics, quantity, value, unit value, and principal supplying countries

Type	Quantity	Foreign value	Value per pound	Chief supplying country
Weighing not over 6 pounds per ream				
	<u>Pounds</u>		<u>Cents</u>	
Stereotype:				
Valued at not more than 15¢ lb.	-	-	-	
Valued at more than 15¢ lb. -----	41,509	\$17,126	41	United Kingdom
Carbon:				
Valued at not more than 15¢ lb.	-	-	-	
Valued at more than 15¢ lb. -----	645,142	332,880	52	United Kingdom, Finland
Pottery:				
Valued at not more than 15¢ lb.	-	-	-	
Valued at more than 15¢ lb. -----	20,422	9,257	45	United Kingdom
Condenser:				
Valued at not more than 15¢ lb.	-	-	-	
Valued at more than 15¢ lb. -----	23	22	96	United Kingdom, Italy
Waxing:				
Valued at not more than 15¢ lb.	-	-	-	
Valued at more than 15¢ lb. -----	-	-	-	
Tissues, n.s.p.f.:				
Valued at not more than 15¢ lb.	-	-	-	
Valued at more than 15¢ lb. -----	81,048	39,337	49	Japan
Copying:				
Valued at not more than 15¢ lb.	-	-	-	
Valued at more than 15¢ lb. <u>2/</u> ---	352,027	211,134	60	Japan
Bibulous:				
Valued at not more than 15¢ lb.	-	-	-	
Valued at more than 15¢ lb. <u>2/</u> ---	94,381	63,261	67	Japan
India and bible:				
Valued at not more than 15¢ lb.	-	-	-	
Valued at more than 15¢ lb. ---	-	-	-	
Total, above classes -----	1,234,552	673,017		
Weighing over 6 pounds and less than 10 pounds per ream:				
Stereotype:				
Valued at not more than 15¢ lb.	-	-	-	
Valued at more than 15¢ lb. -----	57	57	100	United Kingdom
Carbon:				
Valued at not more than 15¢ lb.	-	-	-	
Valued at more than 15¢ lb. -----	475,003	203,120	43	United Kingdom, Finland
Pottery:				
Valued at not more than 15¢ lb.	-	-	-	
Valued at more than 15¢ lb. -----	-	-	-	
Condenser:				
Valued at not more than 15¢ lb.	-	-	-	
Valued at more than 15¢ lb. -----	84	73	87	United Kingdom, Italy
Waxing:				
Valued at not more than 15¢ lb.	-	-	-	
Valued at more than 15¢ lb. -----	-	-	-	

See footnotes at end of table.

TISSUE AND SIMILAR PAPERS, EXCEPT CIGARETTE PAPER-Continued

Table 4.- Tissue paper, weighing less than 10 pounds per ream, dutiable under paragraph 1404: ^{1/} United States imports in 1939, by types distinguished in trade statistics, quantity, value, unit value, and principal supplying countries-Continued

Type	Quantity	Foreign value	Value per pound	Chief supplying country
	Weighing over 6 pounds and less than 10 pounds per ream-continued			
	Pounds		Cents	
Tissue, n.s.p.f.:				
Valued at not more than 15¢ lb.	612	70	11	Canada, Japan
Valued at more than 15¢ lb. -----	32,401	8,023	25	Japan
Copying:				
Valued at not more than 15¢ lb.	-	-	-	
Valued at more than 15¢ lb. ^{2/} -----	18,028	19,622	109	Japan
Bibulous:				
Valued at not more than 15¢ lb.	531	64	12	Japan
Valued at more than 15¢ lb. ^{2/} -----	2,038	1,713	84	Japan
India and bible:				
Valued at not more than 15¢ lb.	60	8	13	Japan
Valued at more than 15¢ lb. -----	-	-	-	
Total, above classes -----	528,814	232,750		
	Weighing 10 pounds or more but less than 20½ pounds per ream:			
India and bible paper -----	41,479	22,215	54	United Kingdom
Total, all classes -----	1,804,845	927,982		

^{1/} Includes india and bible paper weighing 10 pounds or more but less than 20½ pounds per ream.

^{2/} Not under consideration for negotiations.

Source: Compiled from official statistics of the U. S. Department of Commerce.

Summary of imports (subject to negotiation),
by countries

Table 5 shows for 1937-39 and 1943 the total value of the imports of those classes of tissue paper (dutiable under par. 1404) which have been listed as subjects for negotiation, with the value supplied by each of the principal countries. The United Kingdom is the dominant source of the imports of these papers, whereas, as already stated, Japan was the principal prewar source of the imports of those papers which are not subject to negotiation.

Table 5.- Tissue paper: Imports of all tissue paper dutiable under paragraph 1404, of classes which are proposed subjects for negotiation, by countries, 1937-39 and 1943

(In thousands of dollars)						
Year	All countries	^{1/} UNITED KINGDOM	Finland	Italy	Japan	Czecho-slovakia
1937 -----	701	484	75	59	63	6
1938 -----	451	281	41	42	63	17
1939 -----	632	451	74	59	41	None
1943 -----	309	303	None	None	3	None

^{1/} Includes imports from CANADA valued at 7 thousand dollars in 1937; 2,000 thousand dollars in 1938; less than 500 dollars in 1939, and 3 thousand dollars in 1943.

Source: Official statistics of the U. S. Department of Commerce.

TISSUE AND SIMILAR PAPERS, EXCEPT CIGARETTE PAPER-Continued

Rates of duty

The duties on tissue paper under paragraph 1404, which are compound, are divided into two weight brackets, under 6 pounds per ream, and 6 but under 10 pounds per ream. The duties on the upper weight bracket are somewhat lower than those on the lower weight bracket. Table 6 summarizes these duties, giving the rates of the act of 1930 and the reduced rates on certain classes resulting from the trade agreements with Canada and the United Kingdom (both effective Jan. 1, 1939). For convenience, the value of the imports in 1939 is also shown.

Table 6.—Tissue paper: Rates of duty under paragraph 1404 in 1930 and 1945, and value of imports, 1939

Type	: Act of 1930	: 1945 rate	: U. S. imports, 1939
: Weighing not over 6 pounds per ream			
Stereotype, carbon, and pottery paper:	:	:	:
Valued at not more than 15¢ lb. -----	6¢ lb. + 20%	3¢ lb. + 10%	-
	: ad val.	: ad val. $\frac{1}{2}$:
Valued at more than 15¢ lb. -----	6¢ lb. + 20%	4¢ lb. + 15%	\$359,263
	: ad val.	: ad val. $\frac{2}{3}$:
Condenser, waxing, and tissue paper, n.s.p.f.:	:	:	:
Valued at not more than 15¢ lb. -----	6¢ lb. + 20%	3¢ lb. + 10%	-
	: ad val.	: ad val. $\frac{1}{2}$:
Valued at more than 15¢ lb. -----	6¢ lb. + 20%	6¢ lb. + 20%	39,359
	: ad val.	: ad val.	:
Copying and bibulous paper:	:	:	:
Valued at not more than 15¢ lb. -----	6¢ lb. + 20%	3¢ lb. + 10%	-
	: ad val.	: ad val. $\frac{1}{2}$:
Valued at more than 15¢ lb. $\frac{3}{4}$ -----	6¢ lb. + 20%	6¢ lb. + 20%	274,395
	: ad val.	: ad val.	:
India and bible paper:	:	:	:
Valued at not more than 15¢ lb. -----	6¢ lb. + 20%	3¢ lb. + 10%	-
	: ad val.	: ad val. $\frac{1}{2}$:
Valued at more than 15¢ lb. -----	6¢ lb. + 20%	6¢ lb. + 20%	-
	: ad val.	: ad val.	:
Total -----			673,017
: Weighing over 6 pounds and less than 10 pounds per ream			
Stereotype, carbon, and pottery paper:	:	:	:
Valued at not more than 15¢ lb. -----	5¢ lb. + 15%	2½¢ lb. + 7½%	-
	: ad val.	: ad val. $\frac{1}{2}$:
Valued at more than 15¢ lb. -----	5¢ lb. + 15%	4¢ lb. + 10%	203,177
	: ad val.	: ad val. $\frac{2}{3}$:
Condenser, waxing, and tissue paper, n.s.p.f.:	:	:	:
Valued at not more than 15¢ lb. -----	5¢ lb. + 15%	2½¢ lb. + 7½%	70
	: ad val.	: ad val. $\frac{1}{2}$:
Valued at more than 15¢ lb. -----	5¢ lb. + 15%	5¢ lb. + 15%	8,096
	: ad val.	: ad val.	:
Copying and bibulous paper:	:	:	:
Valued at not more than 15¢ lb. -----	5¢ lb. + 15%	2½¢ lb. + 7½%	64
	: ad val.	: ad val. $\frac{1}{2}$:
Valued at more than 15¢ lb. $\frac{3}{4}$ -----	5¢ lb. + 15%	5¢ lb. + 15%	21,335
	: ad val.	: ad val.	:
India and bible paper:	:	:	:
Valued at not more than 15¢ lb. -----	5¢ lb. + 15%	2½¢ lb. + 7½%	8
	: ad val.	: ad val. $\frac{1}{2}$:
Valued at more than 15¢ lb. -----	5¢ lb. + 15%	5¢ lb. + 15%	-
	: ad val.	: ad val.	:
Total -----			232,750

See footnotes at end of table.

TISSUE AND SIMILAR PAPERS, EXCEPT CIGARETTE PAPER-Continued

Table 6.- Tissue paper: Rates of duty under paragraph 1404 in 1930 and 1945, and value of imports, 1939-Continued

Type	Act of 1930	1945 rate	U. S. imports, 1939
		Weighing 10 pounds or more and less than 20½ pounds per ream	
India and bible paper -----	4¢ lb. + 15% ad val.	2¢ lb. + 10% ad val. 2/	\$22,215

1/ Trade agreement with Canada, effective January 1939.

2/ Trade agreement with United Kingdom, effective January 1939.

3/ Not under consideration for negotiation; Japan principal supplier.

Until the second trade agreement with Canada, effective January 1, 1939, the rates of duty under paragraph 1404 in each of the two weight brackets (under 6 pounds, and 6 to 10 pounds per ream) were uniform regardless of the price of the paper. The range in prices of tissue paper is extremely wide, from a few cents to well over \$1 per pound. The specific part of the compound duty (then 6 cents and 5 cents per pound on the two weight brackets, respectively) exceeded the domestic price of the larger part of the tissue paper produced in this country, even of that weighing less than 10 pounds per ream. The duty also completely precluded imports of medium-priced papers, since the foreign producer in order to compete would have had to accept a quite unremunerative price.

By the 1939 trade agreement with Canada, a maximum reduction was made in the rates of paragraph 1404 on tissue paper valued at less than 15 cents per pound. The specific rates became 3 and 2½ cents per pound, respectively. Even so, the specific part of the duties continued to preclude entirely the importation of low-priced papers, and the importation of medium-priced papers at the reduced rate was altogether insignificant.

In considering possible concessions on tissue paper, a sharp distinction must be drawn between the two value brackets established by the Canadian agreement.

The upper value bracket.--The bulk of the imported tissue papers have been valued at much more than 15 cents per pound, some of them at more than \$1 per pound; the average for all imports in prewar years was around 50 cents per pound. The burden of the duty, of course, varies with the price of the paper. If valued at just over 15 cents per pound, the rate of 6 cents per pound plus 20 percent ad valorem, which is still applicable to some kinds of light-weight paper (under 6 pounds per ream) would be equal to 60 percent ad valorem, and the rate of 5 cents per pound plus 15 percent on the heavier papers of the same kinds would be equal to nearly 46 percent ad valorem. For papers valued at \$1 per pound the corresponding ad valorem equivalents would be 26 percent and 20 percent, respectively. The reduced rates on part of these papers, which are 4 cents per pound plus 15 percent and 4 cents per pound plus 10 percent, according to weight brackets, are still high in ad valorem equivalent on papers valued not much above 15 cents per pound.

TISSUE AND SIMILAR PAPERS, EXCEPT CIGARETTE PAPER--Continued

The lower value bracket.--In considering the duties on the lower value bracket, distinction must here be made between cheap papers and those of intermediate value. The bulk of the domestic production of papers of kinds dutiable under this bracket consists of papers selling, at prewar price levels, for from 3 to 8 cents per pound. ^{1/} There is, however, some production, both in this country and abroad, of papers of medium price, say those corresponding to a foreign value of 6 to 15 cents per pound.

The several classes of paper distinguished in the census statistics of production (table 2) apart from the "high grades," fall roughly into two groups: (a) Waxing, wrapping, toweling, toilet tissue, napkin stock, and miscellaneous papers, with average values (including papers weighing over 10 pounds per ream) for the several classes ranging in 1939 from 3.5 to 6.2 cents per pound; and (b) pattern tissue, sales-book tissue, and carpet twisting paper, with average values ranging from 7.4 to 8.5 cents for the several classes.

^{1/} It is impossible to classify cheap domestic papers on the basis of the foreign value per pound of corresponding papers. With the existing duties, foreign producers of paper of the cheap types would have to accept insignificant prices, or even negative prices, in order to sell such papers in the United States market.

STEREOTYPE TISSUE WEIGHING LESS THAN 10 POUNDS
PER REAM

Par. No. 1404
UNITED KINGDOM
CANADA

Stat. import classes (1939): 4728.01, 4728.02, 4729.01, 4729.02

United States production, exports, and imports, 1937-39 and 1943

Year	Production	Domestic exports	Imports for consumption from--				
			All countries	UNITED KINGDOM	Japan	Italy	CANADA
Quantity (pounds)							
1937	Not	Not	58,995	46,743	11,527	725	-
1938	avail-	avail-	26,446	17,555	6,785	2,106	-
1939	able	able <u>1</u> /	41,566	36,460	2,534	1,694	-
1943	(see text)		9,070	8,296	-	-	774
Value (dollars)							
1937	Not	Not	27,670	21,507	5,394	769	-
1938	avail-	avail-	12,036	7,987	3,393	656	-
1939	able	able <u>1</u> /	17,183	14,073	1,185	1,696	-
1943	(see text)		4,837	4,584	-	-	253

^{1/} Probably negligible.

Source: Imports from official statistics of the U. S. Department of Commerce.

Item	United States tariff		Proposed negotiating country
	Act of 1930	1945 rate	
Papers commonly or commercially known as stereotype paper:			
Weighing not over 6 lb. per ream:			
Valued at not over 15¢ per lb.--	6¢ lb. + 20% ad val.	3¢ lb. + 10% ad val. ^{1/}	CANADA, UNITED KINGDOM
Valued at more than 15¢ per lb.--	6¢ lb. + 20% ad val.	4¢ lb. + 15% ad val. ^{2/}	UNITED KINGDOM
Weighing over 6 lb. but less than 10 lb. per ream:			
Valued at not over 15¢ per lb.--	5¢ lb. + 15% ad val.	2½¢ lb. + 7½% ad val. ^{1/}	CANADA, UNITED KINGDOM
Valued at more than 15¢ per lb.--	5¢ lb. + 15% ad val.	4¢ lb. + 10% ad val. ^{2/}	UNITED KINGDOM

^{1/} Trade agreement with Canada, effective January 1939.

^{2/} Trade agreement with United Kingdom, effective January 1939.

Note.-- The duty of 4 cents a pound plus 15 percent ad valorem on stereotype tissue weighing not more than 6 pounds per ream and valued at more than 15 cents a pound imported in 1939 was equivalent to 25 percent ad valorem or 10 cents a pound. The duty of 4 cents a pound plus 10 percent ad valorem on similar paper weighing over 6 pounds but less than 10 pounds per ream and valued at not more than 15 cents a pound was equivalent to 14 percent ad valorem or 14 cents a pound. No stereotype tissue valued at less than 15 cents a pound was imported in 1939.

Comment

Stereotype tissue is a thin, fine paper of even texture and considerable strength made of rag or sulphite wood pulp. It is made specially for use as a facing for wet matrix board from which newspaper and other stereotype plates are cast.

STEREOTYPE TISSUE WEIGHING LESS THAN 10 POUNDS PER REAM-

Continued

The production of stereotype tissue in the United States has not been separately shown in statistics, but it has been declining for a number of years because the use of matrices built up as needed in newspaper composing rooms has been largely superseded by the use of so-called "dry mats" already laminated and surfaced. Most of the output weighs less than 6 pounds per ream. The three concerns listed as making stereotype tissue are in Illinois, Massachusetts, and Virginia. Their combined output probably does not exceed 1 million pounds annually and may be considerably less. Production, however, is many times larger than imports and if imported would be valued at more than 15 cents a pound.

Imports, like domestic production, have tended to decrease for a number of years, principally because of the growing use of dry-mats by newspapers.

Exports have not been separately shown but have probably been negligible.

In 1939, after the reduction in the duty by the agreement with the United Kingdom, effective January 1 of that year, imports from the United Kingdom were over twice as great as in 1938 but smaller than in 1937, perhaps by reason of the general downward trend in consumption of these papers.

Stereotype tissue weighing less than 10 pounds per ream: United States
Imports for consumption, by kind, with principal sources, 1939

Kind	Total value	Principal sources
Weighting not over 6 lb. per ream:		
Valued at not more than 15¢ lb.---	-	
Valued at more than 15¢ lb. -----	\$17,126	UNITED KINGDOM, \$14,073; Japan, \$1,639; Italy, \$1,185
Weighting over 6 lb. and less than 10 lb. per ream:		
Valued at not more than 15¢ lb. --	-	
Valued at more than 15¢ lb. -----	\$57	Japan, \$57

Source: Official statistics of the U. S. Department of Commerce.

COPYING TISSUE WEIGHING LESS THAN 10 POUNDS PER REAM,
VALUED NOT MORE THAN 15 CENTS PER POUND

stat. import classes (1939): 4728.11 and 4729.11

United States production, exports, and imports for consumption, 1/
1937-39 and 1943

Year	Production	Domestic exports
	Quantity (pounds)	
1937 -----	Not available	Not
1938 -----	(probably	available
1939 -----	less than 200,000	(probably
1943 -----	pounds per year)	negligible)

1/ No imports in 1939 and 1943. Believed to be negligible or none in earlier years.

Source: Official statistics of the U. S. Department of Commerce.

Item	United States tariff		Proposed negotiating country
	Act of 1930	1945 rate	
Par. 1404			
Copying paper weighing not over 6 lb. per ream:			
Valued at not over 15¢ lb. -----	6¢ lb.+ 20%	3¢ lb.+ 10%	CANADA
	ad val.	ad val. <u>1/</u>	
Copying paper weighing over 6 lb. but less than 10 lb. per ream:			
Valued at not over 15¢ lb. -----	5¢ lb.+ 15%	2½¢ lb.+ 7½%	CANADA
	ad val.	ad val. <u>1/</u>	
<u>1/</u> Trade agreement with Canada, effective January 1939.			

Comment

Copying tissue of a grade having a foreign value of not more than 15 cents a pound is made of rag or sulphite wood pulp or a mixture of these. The higher grades, not here considered for negotiation because imports of these have come almost exclusively from Japan, are made almost entirely of rag fiber. This paper contains little sizing and is used for letter-press copying or for special manifold purposes.

Only three or four concerns in the United States produce copying tissue, all of these being located in the Northeastern States. Output of the grade (weight and price) herein considered is not separately shown in the statistics of production but is believed to be less than 200,000 pounds a year, most of it weighing between 6 and 10 pounds to the ream and valued at more than 15 cents a pound. Output has decreased over the last 3 or 4 decades as the result of improved office practice in which letter-press copying is no longer used.

No imports of thin copying paper of low unit value are of record.

Exports are not separately shown but are probably negligible.

CONDENSER TISSUE WEIGHING LESS THAN 10 POUNDS PER REAM

Stat. import classes (1939): 4728.21; 4728.22; 4729.21; 4729.22

United States production, exports, and imports, 1937-39 and 1943

Year	Production	Domestic exports	Imports for consumption from---			
			All countries	UNITED KINGDOM	Italy	CANADA
Quantity (pounds)						
1937	<u>1/</u> 2,749,945	Not avail- able <u>4/</u>	<u>2/</u> 1,136	572	-	N
1938	n. a.		<u>2/</u> 1,248	-	-	O
1939	n. a.		107	84	23	N
1943	<u>3/</u> 10,936,000		-	-	-	E
Value (dollars)						
1937	<u>1/</u> 1,456,102	Not avail- able <u>4/</u>	<u>2/</u> 391	236	-	N
1938	n. a.		<u>2/</u> 475	-	-	O
1939	n. a.		95	73	22	N
1943	<u>5/</u> 4,400,000		-	-	-	E

1/ Data furnished by the Writing Paper Manufacturers Association.2/ Includes 1,114 pounds valued at \$433 imported from Czechoslovakia.3/ Includes all condenser papers up to about 3 one-thousandths of an inch thick.4/ Probably negligible. 5/ Estimated by the U. S. Tariff Commission.

Source: Imports from official statistics of the U. S. Department of Commerce.

Item	United States tariff		Proposed negotiating country
	Act of 1930	1945 rate	
Par. 1404			
Condenser paper:			
Weighing not over 6 lb. per ream:			
Valued at not over 15¢ lb.	6¢ lb. + 20% ad valorem	3¢ lb. + 10% ad valorem <u>1/</u>	CANADA and UNITED KINGDOM
Valued at more than 15¢ lb.	6¢ lb. + 20% ad valorem	6¢ lb. + 20% ad valorem	UNITED KINGDOM
Weighing over 6 lb. but less than 10 lb. per ream:			
Valued at not over 15¢ lb.	5¢ lb. + 15% ad valorem	2½¢ lb. + 7½% ad valorem <u>1/</u>	CANADA and UNITED KINGDOM
Valued at more than 15¢ lb.	5¢ lb. + 15% ad valorem	5¢ lb. + 15% ad valorem	UNITED KINGDOM

1/ Trade agreement with Canada, effective January 1939.

Note.- The duty of 6 cents a pound plus 20 percent ad valorem on condenser tissue weighing not over 6 pounds per ream and valued at more than 15 cents a pound imported in 1939 was equivalent to 26 percent ad valorem or 26 cents a pound; on similar paper weighing over 6 pounds but less than 10 pounds per ream and valued at more than 15 cents a pound, the duty of 5 cents a pound plus 15 percent ad valorem was equivalent to 21 percent ad valorem or 13 cents a pound. No condenser tissue valued at less than 15 cents a pound was imported in 1939.

CONDENSER TISSUE WEIGHING LESS THAN 10 POUNDS PER REAM—Continued

Comment

Condenser tissue is a thin paper, ranging from 3 ten-thousandths to 1 one-thousandth of an inch in thickness, made from rag, linen, or sulphate wood pulp or mixtures of these. It is of close formation, free from all foreign materials, and has a supercalendered finish. It is used as a dielectric in the manufacture of dry condensers.

Of the seven or eight domestic concerns making condenser paper, only three or four produce the tissues herein considered, which comprise those 1 one-thousandth of an inch or less in thickness and weighing not more than about 11 or 12 pounds to the ream, most of it, however, ranging from 7½ to 10 pounds per ream. These mills, all in the New England States, also make other fine tissues for various purposes. The domestic output of condenser tissue is not shown in census data, but is estimated to have been about 3 million pounds in 1939 and between 5 and 7 million pounds in 1943. This paper, if imported, would be valued at well over 15 cents a pound.

Imports of condenser tissue have always been negligible compared with domestic output. Since the first years of the war these have practically ceased, principally because of the ability of the domestic industry to supply requirements for the less expensive kinds of condenser papers.

Exports are not separately indicated in statistics but are probably negligible.

Condenser tissue weighing less than 10 pounds per ream:
United States imports for consumption, by kind,
with principal sources, 1939

Kind	Total value	Principal sources
Weighing not over 6 lb. per ream:		
Valued at not over 15¢ lb. ----:	-	
Valued at more than 15¢ lb. ----:	\$22	Italy, \$22.
Weighing over 6 but less than 10 lb. per ream:		
Valued at not over 15¢ lb. ----:	-	
Valued at more than 15¢ lb. ----:	73	UNITED KINGDOM, \$73

Source: Official statistics of the U. S. Department of Commerce.

CARBON TISSUE, COATED OR UNCOATED, WEIGHING LESS THAN 10 POUNDS PER REAM

Stat. import classes (1939): 4728.31, 4728.32, 4729.31, 4729.32

United States production, exports, and imports, 1937-39 and 1943

Year	Production <u>1/</u>	Domestic exports	Imports for consumption from--				
			All countries	UNITED KINGDOM	Finland	Italy	CANADA
Quantity (pounds)							
1937	<u>2/</u> 2,695,000	Not avail- able <u>4/</u>	1,111,273	770,435	183,540	109,164	11,423
1938	n.a.		663,122	436,020	96,404	68,426	2,689
1939	<u>2/</u> 6,421,000		1,120,145	820,811	176,051	108,721	370
1943	<u>3/</u> 41,956,000		362,281	361,630	-	-	651
Value (dollars)							
1937	<u>2/</u> 1,073,855	Not avail- able <u>4/</u>	541,964	392,329	75,032	49,025	7,400
1938	n.a.		330,711	232,845	39,751	33,641	1,982
1939	<u>5/</u> 2,365,000		536,000	405,230	73,735	50,182	349
1943	n.a.		228,790	228,054	-	-	736

1/ Uncoated carbonizing tissue only. Although both uncoated and coated carbon papers are included in the statistical classes here considered, imports are entirely of uncoated paper for carbonizing in the United States.

2/ Data furnished by the Writing Paper Manufacturers Association.

3/ Includes all thin carbonizing paper, regardless of weight, as reported to the Census.

4/ Exports of coated carbon paper have amounted to \$400,000-\$800,000 annually. Exports of uncoated paper not available but known to be small.

5/ Estimated by the U. S. Tariff Commission.

Source: Official statistics of the U. S. Department of Commerce, except as noted.

Item	United States tariff		Proposed negotiating country
	Act of 1930	1945 rate	
Par. 1404			
Carbon paper, coated or uncoated:			
Weighing not over 6 lb. per ream:			
Valued at not over 15¢ lb. ---	6¢ lb.	3¢ lb.	UNITED KINGDOM, CANADA
	+ 20%	+ 10%	
	ad val.	ad val. ^{1/}	
Valued at more than 15¢ lb. ---	6¢ lb.	4¢ lb.	UNITED KINGDOM
	+ 20%	+ 15%	
	ad val.	ad val. ^{2/}	
Weighing over 6 lb., but less than 10 lb. per ream:			
Valued at not over 15¢ lb. ---	5¢ lb.	2½¢ lb.	UNITED KINGDOM, CANADA
	+ 15%	+ 7½%	
	ad val.	ad val. ^{1/}	
Valued at more than 15¢ lb. ---	5¢ lb.	4¢ lb.	UNITED KINGDOM
	+ 15%	+ 10%	
	ad val.	ad val. ^{2/}	

1/ Trade agreement with Canada, effective January 1939.

2/ Trade agreement with the United Kingdom, effective January 1939.

Note.-- The duty of 4 cents a pound plus 15 percent ad valorem on carbon tissue weighing not more than 6 pounds per ream and valued at more than 15 cents a pound imported in 1939 was equivalent to 23 percent ad valorem or 12 cents a pound; on similar paper weighing over 6 pounds but less than 10 pounds per ream and valued at more than 15 cents a pound, the duty of 4 cents a pound plus 10 percent ad valorem, was equivalent to 19 percent ad valorem or 8 cents a pound. No carbon tissue valued at 15 cents or less per pound was imported in 1939.

CARBON TISSUE, COATED OR UNCOATED, WEIGHING LESS THAN 10
POUNDS PER REAM-Continued

Comment

Uncoated carbon tissue of the highest quality is made of new cotton and linen rags. Some sulphite wood pulp is used in other grades. When coated on one side with a carbonizing mixture, it becomes the carbon paper of commerce.

The production of the uncoated carbon tissue weighing less than 10 pounds to the ream is confined to four or five concerns all of which are in the Northeastern States. Production of these tissues in 1939 was approximately 6.5 million pounds, but by 1943 it was estimated at between 20 and 25 million pounds. This increase was the result not only of the greater volume required for making carbon paper but also of the large additional quantity of the same type of tissue used for the manufacture of several articles needed for the prosecution of the war. About 85 percent of production is between 6 and 10 pounds per ream in weight and, if imported, would be valued at substantially more than 15 cents a pound.

Between 35 and 40 concerns, widely scattered throughout the United States, make coated carbon paper, the larger part of the capacity being in Illinois, New Jersey, and New York. These concerns all buy the plain paper which they coat, either from domestic or from foreign producers, none of them being engaged in the manufacture of the cheap basic paper. No statistics covering production are available since 1939 when carbon paper valued at nearly 12 million dollars was made. Capacity has for many years been sufficient to supply the entire domestic demand and also that of a substantial export market.

Imports of carbon papers have been almost exclusively uncoated tissues, principally of the lightest weights and almost entirely in the higher price ranges. Imports of coated carbon paper are of little or no significance. From about 1934 to 1941 the average quantity of carbonizing tissue imported did not change materially although the proportion of domestic consumption represented by imports declined markedly because of expanding domestic production. After 1941 imports decreased because of the war.

Exports of uncoated carbonizing tissues are not shown separately in the statistics of foreign trade, but their volume has been small. Coated carbon paper exports have ranged from \$400,000 to \$800,000 annually in value since 1935, the principal markets being Canada and the Latin American countries.

Imports of carbonizing tissue, all of which were valued at more than 15 cents per pound, in 1939 after the considerable reduction in the duty by the trade agreement with the United Kingdom, effective January 1 of that year, were much larger than in 1938 and slightly larger than in 1937. They were equal to about one-fifth of the domestic production.

CARBON TISSUE, COATED OR UNCOATED, WEIGHING LESS THAN 10
POUNDS PER REAM—Continued

Carbon tissue, coated or uncoated, weighing less than 10 pounds per
ream: United States imports for consumption, with principal
sources, 1939

Kind	Total value	Principal sources
Weighing not over 6 lb. per ream:		
Valued at not over 15¢ lb.	-	-
Valued at more than 15¢ lb.	\$332,880	UNITED KINGDOM, \$241,309; Italy, \$45,454; Finland, \$42,190; Germany, \$2,229
Weighing over 6 but less than 10 pounds per ream:		
Valued at not over 15¢ lb.	-	-
Valued at more than 15¢ lb.	203,120	UNITED KINGDOM, \$163,921; Finland, \$31,545; Italy, \$4,728.

1/ Includes Austria.

Source: Official statistics of the U. S. Department of Commerce.

BIBULOUS PAPER WEIGHING LESS THAN 10 POUNDS PER
REAM VALUED NOT MORE THAN 15 CENTS PER POUND

Stat. import classes (1939): 4728.41, 4729.41

United States production, exports, and imports, 1937-39 and 1943

Year	Production	Domestic exports	Imports for consumption from--			
			All countries	Japan	CANADA	
	Quantity (pounds)					
1937 --	Not	Not	n.a.	.	.	
1938 --	avail-	avail-	n.a.	.	.	
1939 --	able	able <u>1/</u>	531	531	-	
1943 --	(see text)		none			
	Value (dollars)					
1937 --	Not	Not	n.a.	.	.	
1938 --	avail-	avail-	n.a.	.	.	
1939 --	able	able <u>1/</u>	64	64	-	
1943 --	(see text)		none			

1/ Believed to be negligible.

Source: Official statistics of the U. S. Department of Commerce.

ItemUnited States tariffProposed
negotiating
countryAct of
19301945
rate

Par. 1404 .

Bibulous paper:

Weighing not over 6 lb. per ream:

Valued at not over 15¢ lb. -- 6¢ lb. + 3¢ lb. +
20% ad val. 10% ad val. 1/

CANADA

Weighing over 6 lb. but less
than 10 lb. per ream:Valued at not over 15¢ lb. -- 5¢ lb. + 2½¢ lb. +
15% ad val. 7½% ad val. 1/

do.

1/ Trade agreement with Canada, effective January 1939.

Note.-- The duty of 2½ cents a pound plus 7½ percent ad valorem on bibulous paper weighing over 6 pounds but less than 10 pounds per ream and valued at not more than 15 cents a pound imported in 1939 was equivalent to 28 percent ad valorem or 3 cents a pound. No imports of bibulous paper weighing not over 6 pounds per ream and valued at not over 15 cents a pound were reported in 1939.

Comment

Bibulous paper is any light-weight rag or chemical wood pulp sheet that is soft, loosely felted, and unsized. It is uncalendered and has the property of absorbing liquids readily. It is usually referred to as waterleaf and is used for the manufacture of vegetable parchment, artificial leather, vulcanized or indurated fiber, and other processed materials of similar nature.

Statistics covering the production of bibulous paper in the United States are not available but, eliminating blotting, filter, and other absorbent papers separately considered, output in 1939 was probably no less than 75 or 80 million pounds, of which not more than 10 or 15 percent was of grades corresponding to a foreign value of not over 15 cents a pound. It is doubtful whether more than a negligible quantity of bibulous paper at this value has been produced domestically since the beginning of the war. The producers of waterleaf are nearly all in the Northeastern States and are producers of other types of paper also.

BIBULOUS PAPER WEIGHING LESS THAN 10 POUNDS PER
REAM VALUED NOT MORE THAN 15 CENTS PER POUND-Continued

Imports of bibulous paper valued at not over 15 cents a pound since the passage of the Tariff Act of 1930 although not distinguished in the statistics before 1939, have probably been nil except in 1939 and 1941 when a few hundred pounds were entered; all from Japan. Imports valued at over 15 cents per pound, a class not under consideration, have been much larger, but very small in comparison with domestic production of that grade.

Exports are not separately shown but are believed to have been negligible.

Bibulous paper weighing less than 10 pounds per ream:
United States imports for consumption, by kind,
with principal sources, 1939

Kind	Total	Principal sources
	value	
weighing not over 6 lb. per ream:	:	:
Valued at not over 15¢ lb. -----	none	:
weighing over 6 lb. but less than	:	:
10 lb. per ream:	:	:
Valued at not over 15¢ lb. -----	\$64	Japan, \$64

Source: Official statistics of the U. S. Department of Commerce.

POTTERY PAPER WEIGHING LESS THAN 10 POUNDS
PER REAM

Stat. import classes (1939): 4728.51, 4728.52, 4729.51, 4729.52

United States production, exports, and imports, 1937-39 and 1943

Year	Production	Domestic exports	Imports for consumption from--			
			All countries	UNITED KINGDOM	CANADA	
	Quantity (pounds)					
1937 ----	Not	Not	27,881	27,881	-	
1938 ----	avail-	avail-	25,621	25,621	-	
1939 ----	able	able <u>1/</u>	20,422	20,422	-	
1943 ----	(see text)		36,860	36,855	5	
	Value (dollars)					
1937 ----	Not	Not	11,061	11,061	-	
1938 ----	avail-	avail-	12,247	12,247	-	
1939 ----	able	able <u>1/</u>	9,257	9,257	-	
1943 ----	(see text)		16,692	16,689	3	

1/ Believed to be negligible.

Source: Official statistics of the U. S. Department of Commerce.

Item	United States tariff		Proposed negotiating country
	Act of 1930	1945 rate	
Par. 1404			
Pottery paper:			
Weighing not over 6 lb. per ream:			
Valued at not over 15¢ lb. ---	6¢ lb. + 20% ad val.	3¢ lb. + 10% ad val. <u>1/</u>	CANADA, UNITED KINGDOM
Valued at more than 15¢ lb. ---	6¢ lb. + 20% ad val.	4¢ lb. + 15% <u>2/</u>	UNITED KINGDOM
Weighing over 6 lb. but less than 10 lb. per ream:			
Valued at not over 15¢ lb. ---	5¢ lb. + 15% ad val.	2½¢ lb. + 7½% ad val. <u>1/</u>	CANADA, UNITED KINGDOM
Valued at more than 15¢ lb. --	5¢ lb. + 15% ad val.	4¢ lb. + 10% ad val. <u>2/</u>	UNITED KINGDOM

1/ Trade agreement with Canada, effective January 1939.2/ Trade agreement with the United Kingdom, effective January 1939.

Note.- There have been no imports of pottery tissue weighing less than 10 pounds per ream valued at less than 15 cents a pound or weighing over 6 pounds but less than 10 pounds valued at more than 15 cents a pound in 1939. The duty of 4 cents per pound plus 15 cents ad valorem on that weighing not over 6 pounds per ream and valued at more than 15 cents a pound imported in 1939 was equivalent to 24 percent ad valorem or 11 cents a pound.

Comment

Pottery paper, more properly known as transfer paper or transfer tissue, is used for carrying lithographed or engraved designs to be transferred from stones or plates to unfinished pottery. It is hard sized and smooth but not highly glazed. It must not be overly flexible, yet be sufficiently so to adapt itself to the contours of irregular surfaces.

POTTERY PAPER WEIGHING LESS THAN 10 POUNDS PER REAM-
Continued

Pottery tissue is made in the United States by one or two concerns in the Northeastern States which also make other varieties of thin papers. Total annual production, which is not separately reported, is probably less than 300,000 pounds. It is believed that the entire output, by far the greater part weighing less than 6 pounds to the ream, would be valued if imported at considerably more than 15 cents a pound.

Imports, which have represented a substantial proportion of total consumption, have for a number of years ranged between 20,000 and 40,000 pounds annually with an average value of from 40 to 50 cents a pound. Only a negligible part of this paper has come from sources other than the United Kingdom. By far the larger portion of these imports have had a basis weight of 6 pounds or less to the ream of 480 sheets 20 by 30 inches.

Exports of these papers, statistics for which are not separately available, are believed to have been negligible.

In 1939, after the considerable reduction in the rate of duty on the lower weight bracket by the trade agreement with the United Kingdom effective January 1 of that year, imports were smaller than in the two preceding years. Imports in 1943, however, were materially larger, although perhaps not a larger proportion of the consumption.

Pottery paper weighing less than 10 pounds per ream: United States
imports for consumption; by kind, with principal
sources, 1939

Kind	: Total : : value :	Principal sources
weighing not over 6 lb. per ream:	:	:
Valued at not over 15¢ lb. -----	:None :	:
Valued at more than 15¢ lb. -----	:\$9,257 :	UNITED KINGDOM, \$9,257
weighing over 6 lb. but less than:	:	:
10 lb. per ream:	:	:
Valued at not over 15¢ lb. -----	:None :	:
Valued at more than 15¢ lb. -----	:None :	:
	:	:

Source: Official statistics of the U. S. Department of Commerce.

WAXING TISSUE WEIGHING LESS THAN 10 POUNDS
PER REAM

Par. No. 1404
CANADA
UNITED KINGDOM

Stat. import classes (1939): 4728.61, 4728.62, 4729.61, 4729.62

United States production, exports, and imports, 1937-39 and 1943

Year	Production ^{1/}	Domestic exports	Imports for consumption from--			
			All countries	UNITED KINGDOM	CANADA	
Quantity (pounds)						
1937 ---	53,616,000	Not avail- able ^{2/}	6,196	6,196	N	
1938 ---	n.a.		none	none	O	
1939 ---	78,294,000		none	none	N	
1943 ---	117,320,000		none	none	E	
Value (dollars)						
1937 ---	3,465,195	Not avail- able ^{2/}	4,375	4,375	N	
1938 ---	n.a.		none	none	O	
1939 ---	3,875,254		none	none	N	
1943 ---	n.a.		none	none	E	

^{1/} Includes waxing tissue weighing up to 12.5 pounds to the ream.

^{2/} Believed to be negligible.

Source: Official statistics of the U. S. Department of Commerce.

Item	United States tariff		Proposed negotiating country
	Act of 1930	1945 rate	
Par. 1404			
Tissue paper for waxing:			
Weighing not over 6 lb. per ream:			
Valued at not over 15¢ lb. ---	6¢ lb. + 20% ad val.	3¢ lb. + 10% ad val. ^{1/}	CANADA, UNITED KINGDOM
Valued at more than 15¢ lb. --	6¢ lb. + 20% ad val.	6¢ lb. + 20% ad val.	UNITED KINGDOM
Weighing over 6 lb. but less than 10 lb. per ream:			
Valued at not over 15¢ lb. ---	5¢ lb. + 15% ad val.	2½¢ lb. + 7½% ad val. ^{1/}	CANADA, UNITED KINGDOM
Valued at more than 15¢ lb. --	5¢ lb. + 15% ad val.	5¢ lb. + 15% ad val.	UNITED KINGDOM

^{1/} Trade agreement with Canada effective January 1939.

Note.- Imports of waxing tissue weighing over 6 pounds but less than 10 pounds per ream have been nil for many years. The only imports of waxing tissue paper weighing not over 6 pounds per ream and valued at not over 15 cents per pound were in 1942, when imports amounted to 215 pounds valued at \$15. The duty of 3 cents per pound plus 10 percent on these negligible imports was equivalent to 53 percent ad valorem or to 4 cents per pound. The last imports of waxing tissue weighing not over 6 pounds per ream and valued at more than 15 cents per pound were in 1937 when imports amounted to 6,196 pounds valued at \$4,375 (see above table). The duty of 6 cents per pound plus 20 percent on these imports was equivalent to 28 percent ad valorem or to 20 cents per pound.

Comment

Waxing tissue is a specially sized, moisture-resistant paper made usually of bleached or unbleached chemical wood pulp. It is used as a base stock to be impregnated or coated on one or both sides with paraffin of high melting point. Waxed paper is employed for wrapping foods and other merchandise requiring protection from moisture or odors.

WAXING TISSUE WEIGHING LESS THAN 10 POUNDS
PFR REAM-Continued

Waxing tissue is made in the United States by about 25 concerns, the majority of which are in the Northeastern States. Production from 1935 to 1941 averaged about 88 million pounds annually valued at approximately 5 cents a pound. During the war output rose to more than 117 million pounds owing to the increased requirements for packing war materials. Most of the domestic output weighs over 10 pounds per ream. Probably none has been valued at more than 15 cents a pound except in the lightest weights.

Imports of waxing tissue have been negligible. Practically all of the domestic product is a low-priced article and the specific part of the duty has been prohibitive of imports. In only 2 years since 1930 has any of this paper been imported. In 1937, when there were some imports, the average foreign value was about 70 cents per pound, or many times the average value of the domestic product. The imports evidently were of some very special type not competitive with most of the domestic production.

Exports, not separately shown, are believed to have been negligible for many years.

INDIA AND BIBLE PAPER WEIGHING LESS THAN 20½
POUNDS PER REAM

Stat. import classes (1939): 4728.71, 4728.72, 4729.71, 4729.72, 4729.91

United States production, exports, and imports, 1937-39 and 1943

Year	Production	Domestic exports	Imports for consumption from--			
			All countries	UNITED KINGDOM	CANADA	
(quantity (pounds))						
1937 ---	Not	Not	107,016	106,534	N	
1938 ---	avail-	avail-	44,147	44,147	O	
1939 ---	able	able <u>1/</u>	41,539	41,479	N	
1943 ---	(see text)		87,274	87,274	E	
Value (dollars)						
1937 ---	Not	Not	51,099	50,890	N	
1938 ---	avail-	avail-	25,029	25,029	O	
1939 ---	able	able <u>1/</u>	22,223	22,215	N	
1943 ---			53,376	53,376	E	

1/ Very small.

Source: Imports from official statistics of the U. S. Department of Commerce.

Item	United States tariff		Proposed negotiating country
	Act of 1930	1945 rate	
Par. 1404			
India and bible paper:			
Weighing not over 6 lb. per ream:			
Valued at not over 15¢ lb. - 6¢ lb. + 3¢ lb. + 1/	20% ad val.	10% ad val.	CANADA, UNITED KINGDOM
Valued at more than 15¢ lb. -----	6¢ lb. + 6¢ lb. + 20% ad val.	20% ad val.	UNITED KINGDOM
Weighing over 6 lb. but less than 10 lb. per ream:			
Valued at not over 15¢ lb. - 5¢ lb. + 2¢ lb. + 1/	15% ad val.	7% ad val.	CANADA, UNITED KINGDOM
Valued at more than 15¢ lb. - 5¢ lb. + 5¢ lb. + 15% ad val.	15% ad val.	15% ad val.	UNITED KINGDOM
Weighing 10 lb. or more but less than 20½ lb. per ream - 4¢ lb. + 2¢ lb. + 15% ad val.	10% ad val.	2/	UNITED KINGDOM

1/ Trade agreement with Canada, effective January 1939.

2/ Trade agreement with the United Kingdom, effective January 1939.

Note.- The duty of 2½ cents a pound plus 7½ percent ad valorem on india and bible paper weighing over 6 pounds but less than 10 pounds per ream and valued at not more than 15 cents a pound imported in 1939 (an insignificant quantity) was equivalent to 26 percent ad valorem or 3 cents a pound; on similar paper weighing 10 pounds or more and less than 20½ pounds per ream, the duty of 2 cents a pound plus 10 percent ad valorem was equivalent to 14 percent ad valorem or 7 cents a pound. None of this type of paper in other weight and value groups was imported in 1939.

INDIA AND BIBLE PAPER WEIGHING LESS THAN $20\frac{1}{2}$
POUNDS PER REAM-Continued

Comment

India and bible papers are light-weight strong printing papers made of pulp from linen or cotton rags and sometimes a small quantity of manila fiber. The heavier papers may contain varying proportions of sulphite wood pulp. They are loaded with barium sulphate and range in weight from about 8 pounds to 24 pounds to the ream. They are characterized by strength, opacity, and a smooth and non-glaring surface, and are used for printing bibles, dictionaries, encyclopedias and other books in which small bulk is a requisite. The term "india" is usually applied to the lighter weight papers and "bible" to those of heavier substance.

The production of india and bible paper in the United States is not separately shown in the statistics. It is estimated, however, that the total output in 1941 did not exceed 8 million pounds at an average value of 9 or 10 cents a pound. The heavier bible papers weighing over 10 pounds to the ream probably represented 60 to 75 percent of the total output. The 12 concerns listed as making this paper are all in the Northeastern and Lake States and each produces other thin papers as well.

Imports have consisted almost entirely of bible paper weighing 10 pounds, or more, and not more than $20\frac{1}{2}$ pounds to the ream. Less than 1 percent of the total imports since 1936 has come from sources other than the United Kingdom. The unit value of imports is considerably greater than that of the domestic paper, the former being valued at from 35 to 50 cents a pound and the latter in recent years (had they been imported) at from 10 to 16 cents a pound. The difference in value indicates a considerable superiority in the quality of the imported paper which is scarcely competitive with the domestic product.

Exports of india and bible paper are not separately shown but are estimated to have been very small.

The abnormal conditions both in the United Kingdom and the United States since 1939 make it impossible to determine what was the effect of the marked reduction in the duty on india and bible paper weighing over 10 pounds per ream, which was brought about by the trade agreement with the United Kingdom effective January 1, 1939.

India and bible paper weighing not more than $20\frac{1}{2}$ pounds per ream:
United States imports for consumption, by weights and values,
with principal sources, 1939

Kind	: Total :	: value :	Principal sources
Weighting not over 6 lb. per ream:	:	:	
Valued at not over 15¢ lb. -----	: None	: -	
Valued at more than 15¢ lb. -----	: None	: -	
Weighting over 6 lb. but less than	:	:	
10 lb. per ream:	:	:	
Valued at not over 15¢ lb. -----	: \$8	: Japan, \$8	
Valued at more than 15¢ lb. -----	: None	: -	
Weighting 10 lb. or more, and less	:	:	
than 20½ lb. per ream -----	: 22,215	: UNITED KINGDOM, \$22,215	
	:	:	

Source: Official statistics of the U. S. Department of Commerce.

Stat. import classes (1939): 4728.81, 4728.82, 4729.81, and 4729.82

Year	Production	Domestic exports	Imports for consumption from--				
			All countries	Japan	Italy	UNITED KINGDOM	CANADA
			Quantity (pounds)				
1937 -	Not	Not	181,757	149,157	21,502	6,021	95
1938 -	avail-	avail-	152,595	120,942	19,614	6,449	-
1939 -	able	able <u>1/</u>	114,061	78,598	33,689	1,234	276
1943 -	(see text)	able <u>1/</u>	22,026	2,762	none	832	18,432
			Value (dollars)				
1937 -	Not	Not	63,428	53,900	4,411	2,524	29
1938 -	avail-	avail-	71,035	60,328	5,048	3,145	-
1939 -	able	able <u>1/</u>	47,430	38,758	8,035	553	39
1943 -	(see text)	able <u>1/</u>	5,648	3,037	none	444	2,167

Source: Official statistics of the U. S. Department of Commerce

<u>Item</u>	<u>United States tariff</u>		<u>Proposed</u> <u>negotiating</u> <u>country</u>
	<u>Act of</u> <u>1930</u>	<u>1945</u> <u>rate</u>	
Par. 1404			
Paper commonly or commercially known as tissue paper and all paper similar to the papers specified in the first clause of paragraph 1404 of the Tariff Act of 1930, n.s.p.f.:			
Weighing not over 6 lb. per ream:			
Valued at not over 15¢ lb. -----	6¢ lb.+ 20%	3¢ lb.+ 10%	CANADA UNITED KINGDOM
	ad val.	ad val. 1/	
Valued at more than 15¢ lb. ----	6¢ lb.+ 20%	6¢ lb.+ 20%	UNITED KINGDOM
	ad val.	ad val.	
Weighing over 6 lb. and less than 10 lb. per ream:			
Valued at not over 15¢ lb. -----	5¢ lb.+ 15%	2½¢ lb.+ 7½%	CANADA, UNITED KINGDOM
	ad val.	ad val. 1/	
Valued at more than 15¢ lb. ----	5¢ lb.+ 15%	5¢ lb.+ 15%	UNITED KINGDOM
	ad val.	ad val.	

Note.- The duty of 6 cents a pound plus 20 percent ad valorem on tissue paper, n.s.p.f., weighing not over 6 lb. per ream and valued at more than 15 cents a pound imported in 1939 was equivalent to 32 percent ad valorem or 16 cents a pound; on similar paper weighing over 6 pounds and less than 10 pounds per ream and valued at not over 15 cents a pound, the duty of $2\frac{1}{2}$ cents a pound plus $7\frac{1}{2}$ percent ad valorem was equivalent to 29 percent ad valorem or 3 cents a pound; on similar paper weighing over 6 pounds and less than 10 pounds per ream, valued at more than 15 cents a pound, the duty of 5 cents a pound plus 15 percent ad valorem was equivalent to 35 percent ad valorem or 9 cents a pound. No imports of similar paper weighing not over 6 pounds per ream and valued at not over 15 cents a pound are of record in 1939.

TISSUE AND SIMILAR PAPER, OTHER, N.S.P.F.,
WEIGHING LESS THAN 10 POUNDS PER REAM-Continued

Comment

Tissue papers not specifically provided for include a wide variety of thin papers, which together account for the great bulk of the domestic production of tissue papers weighing less than 10 pounds per ream. These papers are made of rag pulp or of chemical or mechanical wood pulp, or mixtures of these pulps. Some of them contain a percentage of rope fiber. These papers may be glazed or unglazed and of any color. They are used for a wide variety of purposes, from wrappings through household uses to printing and decorating. They may range in price from 6 cents or less to \$2 or more per pound, but the bulk of the domestic production consists of low-priced papers.

Of the classes of papers distinguished in census production statistics and shown in table 2, all except the first two named (high grades and waxing paper) consist wholly or chiefly of kinds which would fall under this n.s.p.f. category if imported. As already stated, the domestic production of the lower and medium grades of tissue papers includes large quantities which weigh 10 pounds or more per ream and which, therefore, are not subject to the protection of paragraph 1404. Nevertheless the domestic production of these papers (not counting waxing paper) of a weight less than 10 pounds per ream is in the neighborhood of 750 million pounds, as compared with imports of 114 thousand pounds in 1939. Their value, if imported, would probably be in excess of 15 cents a pound. Imports under this statistical class in the years before the war were all high-priced papers not competitive with the bulk of the domestic production. The annual average unit value of the imports was usually from 40 to 50 cents per pound.

Exports of papers corresponding to those in this import classification are not shown separately in the statistics but, even if only papers weighing less than 10 pounds per ream were included, the exports were several or many times greater than the imports, in quantity, although of materially lower average unit value.

Tissue paper, n.s.p.f., weighing less than 10 pounds per ream:
United States imports for consumption, by kind,
with principal sources, 1939

Kind	Total value	Principal sources
Weighting not over 6 pounds per ream:		
Valued at not over 15¢ lb. -----	-	
Valued at more than 15¢ lb. -----	\$39,337	Japan, \$38,534; Italy, \$758; France, \$22, UNITED KINGDOM, \$23.
Weighting over 6 pounds but less than 10 pounds per ream:		
Valued at not over 15¢ lb. -----	70	CANADA, \$39; Japan, \$24
Valued at more than 15¢ lb. -----	\$,023	Italy, \$7,277; UNITED KINGDOM, \$530; Japan, \$200; France, \$16.

Source: Official statistics of the U. S. Department of Commerce.

CREPE PAPER

Stat. import classes (1939): 4729.93, 4729.95

United States production, exports, and imports, 1937-39 and 1943

Year	Pro- duction <u>1/</u>	Domestic exports <u>1/</u>	Imports for consumption from--				
			All countries	Japan	Germany <u>2/</u>	CANADA	UNITED KINGDOM
	Quantity (short tons)						
1937	133,000	500	26	25	1	<u>3/</u>	<u>3/</u>
1938	n.a.	550	12	10	1	<u>3/</u>	<u>3/</u>
1939	215,000	600	17	14	1	1	-
1943	275,000	500	77	-	-	77	-
	Value (dollars)						
1937	15,350,000	103,000	10,268	8,877	972	20	244
1938	n.a.	110,000	4,515	3,138	1,141	42	68
1939	18,725,000	117,000	6,630	3,686	2,496	206	-
1943	n.a.	100,000	36,632	-	-	36,632	-

^{1/} Estimated by the U. S. Tariff Commission from statistics of the U. S. Department of Commerce which include other tissue paper.^{2/} Includes Austria beginning 1938.^{3/} Less than one-half ton.

Source: Official statistics of the U. S. Department of Commerce except as noted.

Item	United States tariff		Proposed negotiating country
	Act of 1930	1945 rate	
Par. 1404			
Crepe paper valued at not more than 12½¢ a pound.	6¢ lb. +15% ad val.	1/3¢ lb. + 7½% ad val.	UNITED KINGDOM CANADA
Crepe paper valued at more than 12½¢ a pound.	6¢ lb. +15% ad val.	6¢ lb. + 15% ad val.	UNITED KINGDOM

^{1/} Trade agreement with Canada, effective January 1939.

Note.- the ad valorem equivalent of the duty on imports in 1939 on crepe paper valued at not more than 12½¢ cents per pound was 37 percent; on crepe paper valued at more than 12½¢ cents per pound, it was 29 percent.

Comment

Crepe paper is any paper which has been given a crinkled effect by means of crowding the moist web or sheet on the drying roll of the paper machine by means of a horizontal blade or "doctor." Creping may be applied to any type of paper from thin tissue to kraft wrapping and shipping sack paper. The degree of creping is indicated by the proportional shortening in the length of the original sheet. Creped and semicreped paper are used in the manufacture of towels and napkins, toilet paper, bags, barrel liners, carnival favors, decorations and novelties.

The production of these papers in the United States probably averaged annually before the war around 16 million dollars in value. Between 30 and 35 mills are listed as producers, some of these also converting it into other articles. Nearly all of these are in the Northeastern and Lake States. Production during the war is estimated to have increased to between 20 and 25 million dollars.

CREPE PAPER--Continued

Imports of crepe paper have always been small and there was no appreciable change as a result of the decrease in duty in 1939. Imports have been limited largely to decorative and novelty papers and some specially processed types. Canada was of relatively little importance as a source for imports of creped paper until after the outbreak of the war when other sources were closed.

Exports, although much larger than imports, probably never exceeded 1 percent of the total value of domestic output and were usually less. It is unlikely that exports will undergo any substantial change.

Crepe paper: United States imports for consumption, by kinds,
with principal sources, 1939

Kind	Total value	Principal sources
Crepe paper valued at not more than 12½ cents a pound -----	\$2,382	Japan, \$2,193; CANADA, \$154; Sweden, \$35
Crepe paper valued at more than 12½ cents a pound -----	4,298	Germany, ^{1/} \$2,496; Japan, \$1,493; Switzerland, \$83; CANADA, \$52

^{1/} Includes Austria.

Source: Official statistics of the U. S. Department of Commerce.

PULP AND PAPER WADDING AND MANUFACTURES OF

Stat. import class (1939): 479.48

United States production, exports, and imports, 1937-39 and 1943

Year	Production	Domestic exports	Imports for consumption from--				
			All countries	UNITED KINGDOM	Japan	France	Germany
1937 1938 1939 1943	Quantity (pounds)						
	Not available (See text)	Not avail- able	2,393	1,167	240	-	986
			4,986	4,861	-	-	-
			3,151	3,041	70	27	-
			-	-	-	-	-
	Value (dollars)						
	Not avail- able	Not avail- able	884	332	44	-	508
			2,177	2,165	-	-	-
			1,611	1,586	7	14	-
			-	-	-	-	-

Source: Official statistics of the U. S. Department of Commerce.

Item	United States tariff		Proposed negotiating country
	Act of 1930	1945 rate	
Par. 1404			
Pulp and paper wadding and manufactures of -----	6¢ lb. + 15% ad val.	6¢ lb. + 15% ad val.	UNITED KINGDOM

Note.- The duty on total imports was equivalent to 27 percent in 1939.

Comment

Pulp and paper wadding, also called artificial cotton, cellulose wadding, and wood pulp wadding, is an absorbent, unsized paper made on either a cylinder or Fourdrinier paper machine and creped from a Yankee drier. It is made of bleached or unbleached sulphite pulp, groundwood, repulped paper machine waste, or any of these in combination. It is light in weight, and desirable characteristics are bulk, softness, cleanness, absorptivity, and high liquid retention. It is used for making surgical dressings, sanitary napkins, and facial or cleansing tissue, and for padding and packing. Roll wadding is usually prepared and sold in several plies.

The production of wood pulp wadding in the United States is not separately reported to the Bureau of the Census, but it is estimated by the industry that in 1943 the output of the 8 or 10 producing concerns was about 150,000 tons a year.

Imports of wadding have been insignificant for many years. The United Kingdom supplied over 75 percent of United States imports for several years before the war, although Germany was probably the most important foreign producer and exporter, with Japan ranking next.

Exports of wadding and articles made therefrom are not segregated in statistics. It has been indicated by the industry, however, that exports before the war were substantial and were increasing in both quantity and value. It is expected they will regain their importance upon the resumption of normal trade activity.

PULP AND PAPER WADDING AND MANUFACTURES OF--Continued

A very large proportion of the pulp and paper wadding produced in the United States is converted by the manufacturers thereof into consumer goods with attendant economies of operation. The field is highly specialized and advertising plays an important part in the merchandising of the goods.

GREASEPROOF AND IMITATION PARCHMENT PAPER, SUPERCALENDERED
AND TRANSPARENT

Stat. import class (1939): 4721.0

United States production, exports, and imports, 1937-39 and 1943

Year	Production	Domestic exports ^{1/}	Imports for consumption from--			
			All countries	NORWAY	Netherlands	
Quantity (1,000 pounds)						
1937 ----	^{1/} 150,000	900	^{2/} 416	46	-	
1938 ----	n.a.	800	57	57	-	
1939 ----	^{1/} 180,000	950	2	2	^{3/}	
1943 ----	^{1/} 250,000	3,500	^{4/} 2	-	-	
Value (dollars)						
1937 ----	^{1/} 16,000,000	180,000	^{2/} 29,158	3,700	-	
1938 ----	n.a.	160,000	5,015	5,000	-	
1939 ----	^{1/} 18,500,000	200,000	192	164	28	
1943 ----	n.a.	900,000	^{4/} 923	-	-	

^{1/} Estimated.^{2/} Includes 370 thousand pounds valued at \$25,420 imported from Sweden; no imports in other years. ^{3/} Less than 500 pounds.^{4/} All from Canada.

Source: Official statistics of the U. S. Department of Commerce, except as noted.

Item	United States tariff		Proposed negotiating country
	Act of 1930	1945 rate	
Par. 1405			
Greaseproof and imitation parchment paper, which have been supercalendered and rendered transparent or partially so, by whatever name known -----	3¢ lb. + 15% ad val.	3¢ lb. + 15% ad val.	NORWAY

Note.-- The duty of 3 cents a pound plus 15 percent ad valorem on total imports in 1939 was equivalent to 53 percent ad valorem or 4 cents a pound.

Comment

The greaseproof and imitation parchment papers here considered are supercalendered (glossy) and transparent types of wrapping paper made of sulphite wood pulp which has been rendered transparent and resistant to grease by hydrolization of the pulp. They are used mainly for wrapping food products and in the manufacture of bags and liners to package articles of an oily or greasy nature.

Although about 30 concerns make imitation parchment, glassine, greaseproof and similar papers, not all of the companies make these papers in supercalendered or transparent form. Most of the producers are located in the Eastern and Lake States and make a wide variety of other papers as well. Domestic production is estimated to have amounted to 180 million pounds in 1939 and to 250 million pounds in 1943.

Exports have been much larger than imports and the principal markets have been Canada, the United Kingdom and British possessions, Latin America, and the Philippines.

GREASEPROOF AND IMITATION PARCHMENT PAPER, SUPERCALENDERED
AND TRANSPARENT-Continued

Imports of these supercalendered and transparent papers have never been more than a small fraction of 1 percent of the domestic output of similar papers and during the war imports were negligible. It is estimated that the greaseproof and imitation parchment paper imported under this classification represented less than half the total imports of all types of greaseproof and imitation parchment entering the country, much of which was differently finished.

VEGETABLE PARCHMENT PAPER

Stat. import class (1939): 4721.2

United States production, exports, and imports, 1937-39 and 1943

Year	Production	Domestic exports	Imports for consumption from—				
			All countries	BELGIUM	France	Italy	Switzer- land
Quantity (1,000 pounds)							
1937	n.a.	Not avail- able	451	366	15	36	7
1938	n.a.		314	278	29	3	4
1939	1/ 52,000		234	188	33	7	6
1943	66,588		4	—	—	—	4
Value (1,000 dollars)							
1937	Not avail- able	Not avail- able	61	41	5	10	2
1938			41	31	7	1	1
1939			39	26	9	2	2
1943			1	—	—	—	1

1/ Estimated.

Source: Official statistics of the U. S. Department of Commerce except as noted.

ItemUnited States tariffProposed
negotiating
countryAct of 1945
1930 rate

Par. 1405

Vegetable parchment paper by what-
ever name known _____3¢ lb. + 2¢ lb. +
15% ad 10% ad
val. val. 1/

BELGIUM

1/ Trade agreement with Belgium, effective May 1935. Bound in trade agreement with Finland, effective November 1936.

Note.— The duty of 2 cents per pound plus 10 percent ad valorem on vegetable parchment paper was equivalent, on total imports in 1939, to 22 percent or to \$0.04 per pound.

Comment

Vegetable parchment is a paper simulating animal parchment in appearance and texture. The paper is impervious to water, fat, and oil. It is used chiefly as a wrapper for butter, meat, and other oily or moist food products. The heavier grades are also used in diplomas, announcements, greeting cards, lamp shades, and other printed and decorative articles.

Three paper mills located in California, Michigan, and Pennsylvania account for virtually the entire domestic production of vegetable parchment. In addition to producing vegetable parchment, these mills manufacture absorbent, manifold, waxed, tissue, and other paper specialties.

One of the principal domestic producers of vegetable parchment paper has recently acquired a pulp and paper mill in Canada in which it will manufacture waterleaf paper for shipment to its paper mill in this country for parchmentizing. It is claimed by the manufacturer that importation of waterleaf paper from Canada will

VEGETABLE PARCHMENT PAPER-Continued

lower the company's cost of production of vegetable parchment paper, and enable shifting one paper machine in its plant in this country from the manufacture of waterleaf to other grades of paper.

Imports of vegetable parchment paper increased sharply following the reduction of the duty in 1935, but declined in 1938 and 1939. Among the factors contributing to the decrease was a 25 percent expansion in the productive capacity of the three domestic mills making vegetable parchment paper.

Exports of vegetable parchment paper are not separately reported in available statistics, but they are believed to be substantial.

Information as to the physical condition of the foreign mills is entirely lacking.

PARAFFIN OR WAX-COATED PAPER

Stat. import class (1939): 4721.3

United States production, exports, and imports, 1937-39 and 1943

Year	Production	Domestic exports	Imports for consumption from--				
			All countries	Nether-lands	BELGIUM	Canada	United Kingdom
	Quantity (pounds)						
1937	Not	Not	5,037	-	1,488	1,652	1,887
1938	avail-	avail-	7,275	565	3,147	1,016	2,547
1939	able <u>1/</u>	able	5,580	2,424	2,840	171	145
1943	able <u>1/</u>	(see text)	1,530	-	-	1,530	-
	Value (dollars)						
1937	55,394,544	Not	870	-	116	154	597
1938	n.a.	avail-	1,451	126	337	86	902
1939	57,403,072	able	657	367	237	28	25
1943	n.a.	(see text)	132	-	-	133	-

1/ Estimated for 1939 only at 395,000 short tons.

Source: Official statistics of the U. S. Department of Commerce, except as noted.

ItemUnited States tariffProposed
negotiating
countryAct of 1945
1930 rate

Par. 1405

Papers with paraffin or wax-
coated surface or surfaces -----3¢ lb. 3¢ lb.
+ 15% + 15%
ad val. ad val.

BELGIUM

Note.-- The duty of 3 cents a pound and 15 percent ad valorem on total imports in 1939 was equivalent to 40 percent ad valorem or 5 cents a pound.

Comment

Paraffin or wax-coated paper is any paper that has been rendered moisture resistant by coating or immersion in melted paraffine or wax. It is generally used for wrapping hardware, foodstuffs, and other merchandise or for lining boxes and cartons containing foods. It is made in rolls and sheets, the finished weight representing 25 or 30 percent wax.

Between 80 and 90 concerns in the United States are producers of waxed paper, most of them being in the northeastern States. The majority of them are converters who obtain their unsized raw stock from independent paper mills. Before 1940 between 500 and 600 million pounds of paper were used each year in the manufacture of 650 to 800 million pounds of waxed paper valued at between 50 and 60 million dollars. During the war output increased somewhat owing to the expanded requirements for protective wrappings on material shipped to armed forces abroad.

PARAFFIN OR WAX-COATED PAPER--Continued

From 1931 to 1940 imports of waxed paper averaged about 10,000 pounds a year, most of it coming from the Netherlands, Belgium, Germany, and the United Kingdom. The papers of highest average unit value came from Germany and those of the lowest from the Netherlands. The imports were largely decorative candy and food wrappers. During the war these imports decreased to less than 2,000 pounds a year, practically all of which came from Canada.

Exports of paraffin paper are not shown separately. It is estimated, however, that these were probably several times the quantity imported although not more than a fraction of 1 percent of output. The average unit value of the waxed paper exported is believed to have been between 15 and 25 cents a pound. The principal markets for this paper are in Latin America.

UNCOATED AND COATED PAPERS, DECORATED,
EMBOSSED, METAL COVERED, ETC.Stat. import classes (1939): 4726.0, 4726.2, 4726.3, 4717.4, 4717.5, 4727.0,
4727.5

United States production, exports, and imports, 1937-39 and 1943

Year	Production	Domestic exports	Imports for consumption from--			
			All countries	UNITED KINGDOM	BELGIUM	Germany ^{1/}
	Quantity (pounds)					
1937 ---	Not avail- able	Not avail- able	1,360,186	28,195	7,570	1,253,170
1938 ---			1,157,121	23,688	4,361	1,004,515
1939 ---			414,241	33,121	6,410	250,388
1943 ---			968	418	-	-
	Value (dollars)					
1937 ---	Estimated at 6-8 million dollars annually	Not avail- able ^{2/}	550,306	16,227	4,985	506,709
1938 ---			429,682	12,952	3,923	386,019
1939 ---			160,707	18,269	4,960	101,529
1943 ---			1,332	925	-	-

^{1/} Includes Austria beginning in 1938.^{2/} Estimated at less than \$100,000 annually in prewar years.

Source: Official statistics of the U. S. Department of Commerce, except as noted.

United States tariff

Par. 1405, Tariff Act of 1930

* * * papers with coated surface or surfaces, embossed or printed otherwise than lithographically, and papers wholly or partly covered with metal or its solutions (except as herein provided), or with gelatin, linseed oil cement, or flock, 5 cents per pound and 15 per centum ad valorem; uncoated papers, including wrapping paper, with the surface or surfaces wholly or partly decorated or covered with a design, fancy effect, pattern or character; except designs, fancy effects, patterns or characters produced on a paper machine without attachments, or produced by lithographic process, $4\frac{1}{2}$ cents per pound and 10 per centum ad valorem, and in addition thereto, if embossed, or printed otherwise than lithographically, or wholly or partly covered with metal or its solutions, or with gelatin or flock, 10 per centum ad valorem: Provided, That paper wholly or partly covered with metal or its solutions, and weighing less than fifteen pounds per ream of four hundred and eighty sheets, on the basis of twenty by twenty-five inches, shall be subject to a duty of 5 cents per pound and 18 per centum ad valorem; * * *

The foregoing provisions of paragraph 1405 embrace a group of coated and uncoated papers which have been decorated, printed (except lithographically), embossed, or wholly or partly covered with metal or its solutions, linseed oil cement, gelatin, or flock. Imports are recorded under seven statistical classes, as follows:

UNCOATED AND COATED PAPERS, DECORATED, EMBOSSED, METAL COVERED,
ETC.—Continued

	<u>Statistical</u> <u>class no.</u> <u>1939</u>	<u>1945</u> <u>rate</u> 1/	<u>Proposed</u> <u>negotiating</u> <u>country</u>
I. Coated papers:			
1. Embossed or printed -----	4726.3 -----	5¢ lb. + 15% ad val.	UNITED KINGDOM
2. Covered with metal or its solutions, linseed oil cement, gelatin, or flock:			
i. Weighing 15-lb. or more per ream -----	4726.0 -----	5¢ lb. + 15% ad val.	do.
ii. Weighing less than 15 lb. per ream -----	4726.2 -----	5¢ lb. + 18% ad val.	do.
II. Uncoated papers:			
1. Wrapping paper:			
i. Decorated or covered with a design, fancy effect, pattern, or character ---	4717.4 -----	4½¢ lb. + 10% ad val.	do.
ii. Embossed, printed, or wholly or partly covered with metal or its solu- tions, gelatin, or flock- -	4717.5 -----	4½¢ lb. + 20% ad val.	do.
2. Paper other than wrapping paper:			
i. Decorated or covered with a design, fancy effect, pattern, or character ---	4727.0 -----	4½¢ lb. + 10% ad val.	BELGIUM
ii. Embossed, printed, or wholly or partly covered with metal or its solu- tions, gelatin, or flock- -	4727.5 -----	4½¢ lb. + 20% ad val.	do.

1/ These rates are the same as those originally provided in paragraph 1405 of the Tariff Act of 1930.

Note.— See table at end of text for ad valorem and specific equivalents of the above rates of duty.

Comment

The decorated, embossed, metal covered, or otherwise processed uncoated and coated papers included in this digest are used for a variety of purposes such as box and carton covering and lining, envelope lining, and in the manufacture of labels, seals, greeting and Christmas cards, and advertising folders. Approximately 20 domestic concerns are engaged in the production of these fancy papers, nine of the concerns being located in Massachusetts, five in Rhode Island, and two each in New Jersey, New York, and Pennsylvania. None of the producers operates a paper mill, but all buy various types and qualities of paper for conversion by printing, glazing, coating, or embossing. The value of output in the United States is estimated at from \$6,000,000 to \$8,000,000 annually.

Prewar imports, principally from Germany, consisted in large part of metal coated paper, with or without designs, weighing 15 pounds or more per ream. The unit value of imports ranged from 15 cents to more than \$1 per pound, depending on the value of the material used in coating. German manufacturers were long recognized as unusually skillful in the production of fancy papers, particularly

UNCOATED AND COATED PAPERS, DECORATED, EMBOSSED, METAL COVERED,
ETC.--Continued.

of metal coated papers, because of the novel and attractive designs and colors attained. (See tabulation of imports in 1939, by countries and classes.)

United States exports of decorated and fancy papers are not separately shown in statistics. It is estimated, however, that the value of exports in prewar years was less than \$100,000 annually.

UNCOATED AND COATED PAPERS, DECORATED, EMBOSSED, METAL COVERED,
ETC.--Continued

Uncoated and coated papers, decorated, embossed, metal covered, etc.:

United States imports for consumption, by kinds, with principal
sources, 1939

Kind	Total value	Principal sources	Ad valorem:	Specific
			equivalent:	equivalent
			of duty	of duty
			Percent	Per pound
Coated paper, embossed or printed.	\$268	Japan, \$153; France, \$65	35	\$0.09
Coated paper, covered with metal or its solutions, linseed oil cement, gelatin, or flock:				
Weighing 15 pounds or more per ream.	144,110	Germany, ^{1/} \$97,325; Switzerland, \$22,514; UNITED KINGDOM, \$16,180; Canada, \$6,566	28	.11
Weighing less than 15 pounds per ream.	3,957	Netherlands, \$1,521; UNITED KINGDOM, \$1,486; China, \$853	29	.14
Wrapping paper:				
Decorated or covered with a design, fancy effect, pattern, or character.	10	Canada, \$10	42	.06
Embossed, printed, or wholly or partly covered with metal or its solutions, gelatin, or flock.	493	UNITED KINGDOM, \$213; Germany, ^{1/} \$171; France, \$109	50	.08
Paper, other than wrap- ping:				
Decorated or covered with a design, fancy effect, pattern, or character.	1,573	Germany, ^{1/} \$1,531	15	.13
Embossed, printed, or wholly or partly covered with metal or its solutions, gelatin, or flock.	10,296	BELGIUM, \$4,960; Norway, \$2,502; France, \$971; UNITED KINGDOM, \$390	34	.11

^{1/} Includes Austria.

Source: Official statistics of the U. S. Department of Commerce.

The dominant import item of this group are papers covered with metal or its solutions, linseed oil, gelatin, or flock, weighing 15 pounds or more per ream, and dutiable at 5 cents per pound plus 15 percent ad valorem. The average ad valorem equivalent of the total imports (\$144,110) was 28 percent. On assumed unit values of 15 cents, 25 cents, 50 cents, and \$1 per pound, the ad valorem equivalent would be 48, 35, 25, and 20 percent, respectively.

COATED BOOK PAPER AND COATED PAPER, N.S.P.F.

Stat. import classes (1939): 4726.4 and 4726.5

United States production, exports, and imports, 1937-39 and 1943

Year	Pro- duction <u>1/</u>	Domestic exports	Imports for consumption from--				
			All countries	Germany <u>2/</u>	UNITED KINGDOM	France	Canada
1937 1938 1939 1943	Quantity (1,000 pounds)						
	Not	10,588	429	185	66	102	5
	avail--	8,071	315	176	48	61	11
		14,152	272	125	68	55	8
	able	18,302	38	-	3	2	31
	Value (1,000 dollars)						
	78,815	1,146	189	109	20	36	3
	n.a.	1,022	153	99	20	25	2
	80,544	1,494	135	69	32	24	4
	n.a.	3,320	17	-	34	1	11

^{1/} Estimated from statistics published by the Bureau of the Census and supplementary information obtained from trade sources.^{2/} Includes Austria beginning 1938.

Source: Official statistics of the U. S. Department of Commerce, except as noted.

ItemUnited States tariffProposed
negotiating
countryAct of
19301945
rate

Par. 1405

Papers with coated surface or
surfaces, n.s.p.f. -----

5¢ lb.

5¢ lb.

+ 15%

+ 15%

ad val.

ad val.

UNITED KINGDOM

Note.- The compound duty on coated paper was equivalent, on total imports in 1939, to 25 percent ad valorem, or 12 cents per pound.

Comment

Coated book paper is a sized base stock made of groundwood, bleached or unbleached chemical wood pulp, esparto, waste paper, or mixtures of any of these. It is coated, on one or both sides, with a white mineral pigment blended with casein, glue, starch, or other adhesive. Color and wax or soap are sometimes added to the coating material in order to obtain the most desirable printing surface. A considerable part of the total output of this paper is coated as a secondary process, but an increasing proportion is coated by means of specially adapted appliances before it leaves the dry end of the paper machine; this latter is known as machine-coated book paper. Coated book paper is commonly used for printing books, magazines, pamphlets, advertising material and similar matter where halftone illustrations are employed. Other surface-coated papers, not specifically provided for in the Tariff Act of 1930, include marbled paper, lithograph paper, gummed papers, paper for making embossed seals, plastic coated papers, various types of box lining and cover paper, and special coated papers used in book binding.

COATED BOOK PAPER AND COATED PAPER, N.S.P.F.--Continued

Approximately 75 plants in the United States produce coated book and coated specialty papers of various kinds. Of these, no more than about 12 make machine-coated book paper, a product developed commercially since around 1933 when approximately 6,000 tons was made. By 1943 over 300,000 tons were produced. In 1939 at least 550,000 tons of all surface-coated papers not specifically provided for in the tariff was produced in the United States, of which about 350,000 tons was surface-coated book paper as made by both paper mills and converting plants. The mills making these papers are, with two or three exceptions, in the Northeastern and Lake States.

Imports of surface-coated papers have for a considerable period been confined exclusively to the decorative and fancy papers used in box covering and lining, embossing, book binding, and the arts, no surface-coated book paper having been imported. The greatly increased United States demand during recent years for coated book paper has been supplied almost entirely by the growing domestic output and very largely by machine-coated paper. The trend of imports of coated papers has been generally downward since 1929. During the period of the war, imports became insignificant. Prewar imports were a small fraction of 1 percent of domestic consumption and in recent years were confined even more than formerly to specialties.

Exports before the war usually ranged in value from 6 to 10 times the value of imports. During the war exports increased. The principal export markets are Cuba, Canada, and the South American Republics.

The demand in the United States printing and publishing industries for higher quality paper, that has arisen from the growth of news-picture magazines, and of the advertising field, has caused an enormous expansion in the output of machine-coated book paper. Imported paper for the same purpose can hardly compete on a price-quality basis. In the better grades of coated book paper, imports, even when cased and fully protected from dampness and atmospheric change, damage and consequent loss in transportation would be too great to permit competition with similar domestic paper in the United States market.

Papers with coated surface or surfaces, n.s.p.f.: United States
imports for consumption, by kinds, with
principal sources, 1939

Kind	Total value	Principal sources
Surface-coated book paper -----	None	
Surface-coated papers, n.s.p.f.	\$134,590	Germany ¹ / ₄ \$68,968; UNITED KINGDOM, \$31,956; France, \$24,182; Canada, \$3,849

¹/ Includes Austria.

Source: Official statistics of the U. S. Department of Commerce.

BOXES OF PAPER, PAPIER-MACHÉ, OR WOOD, COVERED

OR LINED

Stat. import classes (1939): 4785.2 and 4785.3

United States production, exports, and imports, 1937-39 and 1943

Year	Production ^{1/}	Domestic exports ^{2/}	Imports for consumption from—				
			All countries	FRANCE	UNITED KINGDOM	Japan	Germany ^{2/}
	Quantity (1,000 pounds)						
1937	Not avail- able	Not avail- able	655	83	151	223	97
1938			341	76	76	90	86
1939			291	107	39	72	14
1943			4/ 44	-	21	-	-
			Value (1,000 dollars)				
1937	Not avail- able	Not avail- able	373	99	94	72	54
1938			205	64	55	40	41
1939			171	86	52	20	9
1943			4/ 43	-	27	-	-

^{1/} Prewar production probably about from two to three times imports.^{2/} Probably less than imports. ^{3/} Includes Austria beginning 1938.^{4/} Includes 2 thousand pounds valued at 8 thousand dollars from Cuba, full duty less 20 percent.

Source: Official statistics of the U. S. Department of Commerce.

Item	United States tariff		Proposed negotiating country
	Act of 1930	1945 rate	
Par. 1405 Boxes of paper, papier-maché, or wood, covered or lined with surface-coated, parch- ment, lithographed, or similar papers —————	5¢ lb.+ 20%	5¢ lb.+ 10% ^{1/}	FRANCE UNITED KINGDOM
Boxes of paper, papier-maché, or wood, covered or lined with cotton or other vege- table fiber —————	5¢ lb.+ 20%	5¢ lb.+ 20%	FRANCE

^{1/} Rate reduced by the trade agreement with the United Kingdom, effective January 1939.

Note.— The ad valorem equivalent of the compound duty on total imports in 1939 of boxes covered or lined with paper was 19 percent; on boxes covered or lined with cotton or other vegetable fiber, 28 percent.

Comment

Boxes of the type here under consideration are used in the retail distribu-
tion of cosmetics, jewelry, and some other luxury products. Frequently the boxes
are designed to hold one or more bottles or containers of unusual shape, or to
hold particular pieces of jewelry. Where foreign merchandise is imported packaged
in such boxes the boxes are not reported under paragraph 1405; their tariff treat-
ment is determined by the provisions of the tariff act dealing with the contained
merchandise.

BOXES OF PAPER, PAPIER-MACHÉ, OR WOOD, COVERED OR LINED—Continued

The boxes covered or lined with paper are used mostly in the retail distribution of cosmetics, fancy soaps, etc., and they commonly bear an imprint of a brand or the name of the manufacturer of the product to be retailed in them. Imported boxes lined or padded with cotton or other vegetable fiber are designed chiefly for packaging watches, bracelets, necklaces, rings, and other jewelry. Some of these imported boxes also bear the imprint of a brand or of a jeweler's name.

About 50 domestic concerns manufacture covered or lined boxes of types in general comparable with imports; in addition, domestically-produced plastic boxes have become a factor in the competitive situation. Production data are not available, but the prewar annual aggregate value is estimated at from two to three times that of the imports.

Imports from the United Kingdom were substantially reduced during the war because of the scarcity of paper and board and of the limitation placed on the production of luxury goods in that country. Shipments from France, Germany, and Japan ceased entirely, but small quantities were entered from Canada, Argentina, and Cuba.

United States exports of fancy boxes are included in statistics covering a general class of boxes and cartons. It is estimated that exports of domestic boxes comparable with imported fancy boxes are of less total value than that of imports under normal conditions.

Imported boxes under consideration are used almost entirely in packaging foreign merchandise for distribution in the United States. This is especially true of boxes covered or lined with decorated papers; with respect to these, the volume of imports is influenced principally by the imports of the articles to be marketed in the boxes.

Boxes of paper, papier-maché, or wood, covered or lined: United States imports for consumption, by principal sources, 1939

Kind	Total value	Principal sources
Covered or lined with surface-coated, parchment, lithographed, or similar paper -----	\$122,367	UNITED KINGDOM, \$49,198; FRANCE, \$57,926; Japan, \$7,595; Germany, ¹ / ₁ \$5,010.
Covered or lined with cotton or other vegetable fibers -----	48,451	FRANCE, \$27,823; Japan, \$12,115; United Kingdom, \$3,021; Cuba, \$498

¹/₁ Includes Austria.

Source: Official statistics of the U. S. Department of Commerce.

BAGS AND OTHER ARTICLES OF SURFACE-COATED,
PARCHMENT, OR SIMILAR PAPERS

Stat. import class (1939): 479.02

United States production, exports, and imports, 1937-39 and 1943

Year	Production	Domestic exports	Imports for consumption from--				
			All countries	Germany <u>1/</u>	Japan	FRANCE	United Kingdom
	Quantity (pounds)						
1937	Not avail- able	Not	462,375	119,841	247,135	30,307	32,929
1938		avail-	318,159	121,084	101,601	29,512	19,250
1939		avail-	266,366	54,877	118,197	32,378	23,931
1943		able	<u>2/</u> 111,531	-	3,989	-	966
	Value (dollars)						
1937	Not avail- able (see text)	Not	180,495	61,262	57,748	31,438	19,991
1938		avail-	124,126	53,376	23,741	23,898	10,791
1939		able	98,233	29,267	25,789	18,894	16,479
1943		able	<u>2/</u> 59,291	-	882	-	826

1/ Includes Austria beginning 1938.2/ Includes 105,061 pounds valued at \$56,327 imported from Canada.

Source: Official statistics of the U. S. Department of Commerce.

Item	United States tariff		Proposed negotiating country
	Act of 1930	1945 rate	
Par. 1405			
Bags, printed matter other than lithographic, and all other articles, composed wholly or in chief value of surface-coated, parchment, or similar papers -----	5¢ lb.	5¢ lb.	FRANCE
	+ 20%	+ 20%	
	ad val.	ad val.	

Note.— The duty of 5 cents a pound plus 20 percent ad valorem on total imports in 1939 was equivalent to 34 percent ad valorem or 12 cents a pound.

Comment

A wide variety of articles are made of the kinds of paper specified in this classification, including bags, baskets, boxes, booklets, labels, calendars, display cartons, show cards, holiday novelties, favors, etc.

Domestic production of articles made of surface-coated, parchment, and similar papers, and printed matter other than lithographic, is not reported separately, but is estimated at between 4 and 8 million dollars annually.

The concerns making the type of articles under consideration are probably several hundred in number. They are widely scattered geographically with some concentration in the northeastern States. Most of them make a variety of paper articles, but largely of other than surface-coated, parchment, and similar papers.

BAGS AND OTHER ARTICLES OF SURFACE-COATED, PARCHMENT,
OR SIMILAR PAPERS--Continued

Imports for many years were supplied principally by Germany and Japan, and consisted largely of boxes and box parts for use in packaging cosmetics and perfumes, calendar backs, display articles, and carnival and holiday novelties. These imports ranged in value from 2 to 5 percent of that of the domestic output. The trend of imports has been gradually downward. During the war imports were much smaller than before the war and came principally from Canada.

Exports are not separately shown in statistics but have been estimated as of somewhat greater value than imports. The principal markets are in Latin America.

SIMPLEX DECALCOMANIA PAPER

Stat. import class (1939): 479.47

Simplex decalcomania paper: United States total imports
for consumption, 1937-39 and 1943 ^{1/}

Year	Quantity	Value
	Pounds	
1937	43,510	\$7,849
1938	31,717	6,004
1939	114,529	19,685
1943	119,223	26,391

^{1/} Imports are practically all from the United Kingdom. Statistics of production and exports are not available.

Source: Official statistics of the U. S. Department of Commerce.

Item	United States tariff		Proposed negotiating country
	Act of 1930	1945 rate	
Par. 1405 Simplex decalcomania paper: Not printed	5¢ lb. + 10% ad valorem	2½¢ lb. + 10% ad valorem ^{1/}	UNITED KINGDOM

^{1/} Trade agreement with the United Kingdom, effective January 1939.

Note.—The ad valorem equivalent of the rate of 2½ cents per pound plus 10 percent ad valorem, on total imports in 1939, was 25 percent; the equivalent specific rate was \$0.04 per pound.

Comment

Simplex decalcomania paper is an unsized absorbent paper with high wet strength and a smooth, uniform finish. It ranges in weight from 50 to 90 pounds to the ream of 500 sheets 25 by 38 inches, and is coated on one side with a mixture of gum arabic and starch or flour. It differs from duplex decalcomania paper in having no thin tissue sheet laminated to the coated side. This paper is used to receive the superimposed lithographic ink impressions which are decalcomanias.

Decalcomanias produced with simplex paper have different uses from and in general are not competitive with those printed on duplex paper. The duplex paper is used for the production of decalcomanias for the ceramic industry and for some types of cold, or commercial, decalcomanias for which simplex paper is not suitable. (See digest on decalcomanias, other than ceramic and toy decalcomanias, paragraph 1406).

The production of simplex decalcomania paper in the United States has not been shown separately in the statistics but is estimated to have been about 3 million pounds annually in 1939 and 1940. The manufacturers of this paper, probably no more than two or three in number, are all in the northeastern States but supply over 60 decalcomania lithographers in 14 widely scattered States principally in Illinois, Ohio, and New York. During the war the output of this paper is reported to have decreased somewhat because of the scarcity of both labor and raw materials as well as the conversion of plant facilities to the production of articles needed in the war effort.

SIMPLEX DECALCOMANIA PAPER-Continued

Imports, which ranged from \$6,000 to \$23,000 between 1931 and 1940, grew to \$57,000 in 1944 largely because United States producers were under war restrictions and were unable to supply the continuing demand.

Exports have not been separately shown in the statistics but are estimated to have been negligible in both quantity and value.

BLUE AND BROWN PRINT PAPER

Stat. import classes (1939): 9040.0, 9040.1

United States production, exports, and imports, 1937-39 and 1943

Year	Production ^{1/}	Domestic exports	Imports for consumption from--			
			All countries	NETHERLANDS	Germany ^{2/}	United Kingdom
	Quantity (pounds)					
1937 ----	Not avail- able	Not avail- able	16,069	4,667	7,446	21
1938 ----			24,423	11,443	11,892	135
1939 ----			24,557	14,804	5,088	3,150
1943 ----			3/ 33	-	-	-
	Value (dollars)					
1937 ----	7,020,402	Not avail- able	8,708	5,507	2,879	9
1938 ----	n.a.		17,594	13,415	3,508	131
1939 ----	5,296,063		18,888	16,895	1,479	332
1943 ----	n.a.		3/ 7	-	-	-

^{1/} Sensitized paper. ^{2/} Includes Austria beginning 1938.

^{3/} Imported from Canada.

Source: Official statistics of the U. S. Department of Commerce.

Item	United States tariff		Proposed negotiating country
	Act of	1945	
	1930	rate	
	Percent ad valorem		
Par. 1405			
Plain basic paper ordinarily used in the manufacture of paper commonly or commer- cially known either as blue print or brown print, and plain basic paper ordinarily used for similar purposes -----	20	20	NETHERLANDS
Sensitized paper commonly or commercially known either as blue print or brown print, and similar sensi- tized paper -----	25	25	
Comment			

Plain basic paper is made of rag fiber or chemical wood pulp or a mixture of these pulps. Sensitized blue print and similar papers are produced in a secondary process by coating the basic paper with light-sensitive chemicals. These papers are used by industry in reproducing maps, charts, and similar drawn, written, or printed material. The wartime demand was exceptionally heavy.

BLUE AND BROWN PRINT PAPER--Continued

Recent trade directories indicate that 13 mills, 10 of which are located in Massachusetts and Wisconsin, produce the basic paper for blue print and brown print paper. The majority of these mills have integrated operations, producing rag pulp for their own use in making writing, ledger, and other high-grade papers. Approximately 40 concerns convert the basic paper into the sensitized papers.

From data compiled by the War Production Board, it is estimated that in 1943 about 60 million pounds of basic blue and brown print paper was manufactured by domestic mills to meet the exceptionally heavy wartime demand. This production is believed to be from 2 to 3 times that of prewar years.

Imports of unsensitized and sensitized blue and brown print paper equalled much less than one-half of 1 percent of domestic production before the war. The Netherlands and Germany were the principal foreign sources of supply.

Export data for these papers are not separately classified, but it is believed that United States exports (whether or not sensitized) have been very small. All important industrial countries are normally producers of these papers.

Information regarding foreign production is lacking, but if the mills in the Netherlands are in a position to operate they will presumably be able to resume shipments to this country.

Blue and brown print paper: United States imports for consumption,
by kind, with principal sources, 1938

Kind	Total value	Principal sources
Plain basic -----	\$11,100	NETHERLANDS, \$7,381; Germany, \$3,454
Sensitized -----	6,494	NETHERLANDS, \$6,034; Germany, \$44

Source: Official statistics of the U. S. Department of Commerce.

PHOTOGRAPHIC PAPER, UNSENSITIZED BASIC AND SENSITIZED

Stat. import classes (1939): 9040.2, 9040.4

United States production, exports, and imports, 1937-39 and 1943

Year	Production	Domestic exports <u>1/</u>	Imports for consumption from--			
			All countries	BELGIUM	UNITED KINGDOM	Germany <u>2/</u>
			Quantity (1,000 pounds)			
1937 ---	n.a.	1,628	970	642	75	251
1938 ---	n.a.	1,589	1,186	808	96	280
1939 --- <u>3/</u>	3,000	1,190	1,531	1,106	85	339
1943 ---	n.a.	<u>4/</u> 2,137	60	-	60	-
			Value (1,000 dollars)			
1937 [*] --- <u>5/</u>	12,286	1,127	568	343	135	87
1938 ---	n.a.	947	734	474	157	103
1939 --- <u>5/</u>	15,821	899	909	663	129	117
1943 ---	n.a.	<u>4/</u> 1,374	69	-	69	-

^{1/} Includes blue or brown print and similar sensitized paper; does not include unsensitized paper.^{2/} Includes Austria beginning 1938.^{3/} Estimated. Production of sensitized paper from domestic and imported unsensitized paper.^{4/} Includes 585 thousand pounds, valued at 453 thousand dollars exported under lend-lease.^{5/} Sensitized photographic paper only.

Source: Official statistics of the U. S. Department of Commerce except as noted.

<u>Item</u>	<u>United States tariff</u>	<u>Proposed negotiating country</u>
	<u>Act of 1930</u>	<u>1945 rate</u>
	Percent ad valorem	

Par. 1405

Unsensitized basic paper * * to be

sensitized for use in photography --- 5 ^{1/} 5

UNITED KINGDOM

Sensitized paper to be used in

photography ----- 30 ^{2/} 22½

BELGIUM

^{1/} Bound in trade agreement with the United Kingdom, effective January 1939.^{2/} Trade agreement with Belgium, effective May 1935.Comment

This digest covers 2 of 3 types of photographic paper provided for in the Tariff Act of 1930 (par. 1405), namely, (1) unsensitized basic paper to be sensitized for use in photography and (2) sensitized paper for use in photography (see tables below). Baryta coated paper, the third type, is not treated in any digest.

Unsensitized basic paper is made from either rag or chemical wood pulp or a combination of both. The most important characteristics of this paper are high chemical purity and exceptional strength when wet. Sensitizing is a secondary process wherein an emulsion is applied to the surface to make it sensitive to light or chemicals. The manufacture of photographic paper in a wide variety of grades and finishes requires special technical skill.

PHOTOGRAPHIC PAPER, UNSENSITIZED BASIC AND SENSITIZED--Continued

Industry directories indicate that three mills, located in New York and Massachusetts, are currently manufacturing the unsensitized paper. Thirteen companies located in the Eastern and Northeastern States manufacture sensitized paper. One large domestic concern produces most of this country's supply of both basic and sensitized paper. Total United States production during the war far exceeded that of the prewar period. Increased use of photography in industry, commerce, and by the amateur public will probably result in a postwar market much larger than that of 1939.

The United Kingdom, Belgium, and Germany before the war supplied unsensitized paper to the United States in quantities equivalent to 5 percent of domestic production. Imports of sensitized paper rose steadily following the duty reduction of 1935. The increase cannot be attributed solely to the lower duty; a general recovery of trade and expansion of the market also contributed. A slightly greater rate of increase was experienced in imports of the unsensitized paper than of the sensitized paper. A considerable difference in 1939 unit values of unsensitized paper imported from the United Kingdom (\$1.57 per pound) and that from Germany (\$0.33) and Belgium (\$0.26) does not necessarily indicate a difference in quality. Unsensitized paper from Germany and Belgium was imported principally by two important converters having close affiliations with mills of those countries.

The following tables give available statistics of production, exports, and imports on unsensitized and sensitized photographic paper, respectively.

Photographic paper, unsensitized basic: United States production, exports, and imports, 1934-39 and 1943

Year	Production	Exports	Imports for consumption from--			
			All countries	UNITED KINGDOM	Germany	Belgium
			Quantity (1,000 pounds)			
1934			153	42	110	-
1935	Not	Not	190	52	121	17
1936	avail	avail-	268	66	201	2/
1937			301	69	230	1
1938	able	able	346	74	269	1
1939			439	75	335	29
1943			52	52	-	-
			Value (1,000 dollars)			
1934			109	77	33	-
1935	Not	Not	133	96	34	3
1936	avail-	avail-	186	122	64	2/
1937			207	129	74	1
1938	able	able	232	140	91	1
1939			246	118	111	17
1943			61	61	-	-

1/ Includes Austria beginning 1938.

2/ Less than 500.

Source: Official statistics of the U. S. Department of Commerce.

PHOTOGRAPHIC PAPER, UNSENSITIZED BASIC AND SENSITIZED--Continued

Photographic paper, sensitized: United States production,
exports, and imports, 1934-39 and 1943

Year	Production	Exports <u>1/</u>	Imports for consumption from--			
			All countries	BELGIUM	United Kingdom	Germany <u>2/</u>
Quantity (1,000 pounds)						
1934 -----	Not avail- able	1,605	529	267	3	257
1935 -----		1,564	497	276	4	215
1936 -----		1,638	642	513	5	115
1937 -----		1,628	669	642	6	20
1938 -----		1,589	840	807	22	10
1939 -----		1,190	1,092	1,077	10	4
1943 -----		<u>3/</u> 2,137	9	-	8	-
Value (1,000 dollars)						
1934 -----	n.a.	1,223	310	162	3	144
1935 -----	n.a.	1,349	272	140	5	126
1936 -----	n.a.	1,127	322	242	5	69
1937 -----	12,286	1,127	360	342	6	12
1938 -----	n.a.	947	501	473	16	12
1939 -----	15,821	899	663	645	11	6
1943 -----	n.a.	<u>3/</u> 1,874	9	-	9	-

^{1/} Includes blue and brown print and similar sensitized paper.

^{2/} Includes Austria beginning 1938.

^{3/} Includes 585 thousand pounds, valued at 453 thousand dollars exported under lend-lease.

Source: Official statistics of the U. S. Department of Commerce.

Exports of unsensitized photographic paper are not separately shown in statistics but are believed to be negligible. Exports of sensitized paper for use in photography probably exceeded imports prior to the war.

Competition in the United States market before the war was dominated by one domestic concern which manufactured unsensitized basic paper for its own use in producing sensitized paper. Other manufacturers of sensitized paper in this country obtained their raw stock principally from abroad. The largest prewar importer of unsensitized paper was a licensee of the German concern I.G. Farbenindustrie. Another concern, with Belgian connections, also imported unsensitized paper. When the Tariff Act of 1930 was enacted, foreign competition in the United States market was confined almost entirely to sensitized paper.

PRINTED MATTER AND TOURIST LITERATURE, NOT SPECIALLY PROVIDED FOR

Stat. import classes (1939): 951.04, 951.47, 951.49, 951.57, 951.59

United States production, exports, and imports, 1937-39 and 1943

Year	Pro- duction ^{1/}	Domestic exports	Imports for consumption from---				
			All countries	UNITED KINGDOM	CANADA	FRANCE	Germany ^{2/}
			Value (1,000 dollars)				
1937	555,609	2/7,560	562	199	88	76	103
1938	n.a.	2/7,500	489	156	86	84	32
1939	452,087	3/7,350	4/535	153	126	78	36
1943	n.a.	5/13,764	6/467	36	425	-	-

^{1/} Includes general commercial printing except newspapers and periodicals printed for others, souvenir cards, and printing on metal.

^{2/} Includes Austria beginning 1938. ^{3/} Estimated.

^{4/} Includes 92 thousand dollars entered free under special provision (World's Fair).

^{5/} Includes 1,935 thousand dollars exported under lend-lease.

^{6/} Free for Government use 34 thousand dollars; also includes free as an act of international courtesy, 357 thousand dollars.

Source: Official statistics of the U. S. Department of Commerce except as noted.

Item	United States tariff		Proposed negotiating country
	Act of 1920	1945 rate	
Par. 1405 Printed matter, n.s.p.f., other than lithographic (composed of surface coated and related papers specified in Par. 1405) -----	5¢ lb.+ 20% ad val.	5¢ lb.+ 20% ad val.	FRANCE

Par. 1410

Printed matter:

Tourist literature containing
historical, geographical, time
table, travel, hotel, or similar
information, chiefly with respect
to places or travel facilities
outside of the continental

United States:

If of bona fide foreign author-
ship -----

15% ad
val.

7½% ad
val. ^{1/}

CANADA

If of other than bona fide
foreign authorship -----

25% ad
val.

12½% ad
val. ^{1/}

do.

Printed matter, n.s.p.f.:

If of bona fide foreign author-
ship -----

15% ad
val.

7½% ad
val. ^{2/}

UNITED KINGDOM

If of other than bona fide
foreign authorship -----

25% ad
val.

20% ad
val. ^{2/}

CANADA AND
UNITED KINGDOM

PRINTED MATTER AND TOURIST LITERATURE, NOT SPECIALLY PROVIDED FOR--Continued

<u>Item</u>	<u>United States tariff</u>		<u>Proposed negotiating country</u>
	<u>Act of 1930</u>	<u>1945 rate</u>	
Par. 1410			
Drawings, engravings, photographs, etchings, maps, and charts, containing additional text conveying historical, geographic, time table, travel, hotel, or similar information, chiefly with respect to places or travel facilities outside the continental United States	25%	12 $\frac{1}{2}$ %	CANADA
	ad val.	ad val. 1/	
1/ Trade agreement with Canada, effective January 1939.			
2/ Trade agreement with United Kingdom, effective January 1939.			
Note.- The duty of 5 cents per pound plus 20 percent ad valorem was equivalent on imports in 1939 to 23 percent ad valorem.			

Comment

The printed matter covered herein consists generally of letterpress work, although neither wholly confined to nor all inclusive of matter printed by this process. Printed matter, n.s.p.f., composed of the surface coated and related papers specified in paragraph 1405 is not subject to the authorship provision (provided in paragraph 1410), and, therefore, may include some types of prints or other matter to which authorship is not imputed. The tourist literature and printed matter n.s.p.f., dutiable under paragraph 1410, must be such that authorship can be ascertained and composed of materials other than the papers specified in paragraph 1405. Drawings, engravings, photographs, etchings, maps and charts which contain textual tourist information are here considered because in import statistics they are combined with tourist literature of other than foreign authorship. In general, the matter covered by the various provisions referred to above is similar to the products of the domestic commercial or job printing industry, which includes general service printing of forms, display, and textual matter, for legal, financial, advertising, commercial, and general purposes.

Classes of printed matter which are not here considered because they are provided for more specifically elsewhere in the tariff act, include books and pamphlets, newspapers and periodicals, greeting and post cards, lithographically printed articles, general engravings, maps and charts, various kinds of prints and pictorial matter, and certain classes of paper or paper articles which may bear imprints or printed designs.

The domestic printing industry is extensive and widely distributed, with concerns in practically all sections of the country. It is chiefly a service industry, work being done on a job or specific order basis.

Imports of tourist literature, which normally constitute the bulk of imports under these classes (see table below showing imports by kinds in 1939), consists of descriptive travel information relating to foreign countries and is generally distributed free in this country. It comes principally from Canada and relates chiefly to that country. Imports of other printed matter consist in part of general material, much of which concerns foreign conditions; in part of material directly associated with other imports, such as advertising media, directions and parts lists, and other merchandising material; and in part of service forms and other material used in this country in connection with foreign trade activities; such as transportation forms and tickets, luggage checks, branch office forms, insurance policies, and financial forms. To a large extent, imports do not compete directly with domestic products, although if the duty were higher some of

PRINTED MATTER AND TOURIST LITERATURE, NOT SPECIALLY PROVIDED FOR--Continued

the material which is now imported would be printed here. Tourist literature, for instance, although not competing with any similar domestic product, could be printed in this country and afford a source of revenue to the domestic industry. There have been imports of some articles which are similar in form or use to domestic products, and of matter printed abroad on specific order of United States consumers which afford direct competition to domestic printers. These include some types of commercial forms, mottoes, poems, literary quotations, or other matter of a general or educational nature, and (usually under paragraph 1405) some types of prints, calendars, and labels, tags, wrappers, and descriptive material for use either with domestic products or with imported products which are packaged here.

Domestic exports, normally, are many times larger than imports, and distribution is world wide. Before the war, Canada was the most important market, but during the war shipments to China were very large and exceeded those to Canada by a wide margin.

Printed matter and tourist literature, n.s.p.f.: United States imports
for consumption, by kinds, with principal sources, 1939

Kind	Total value	Principal source
Printed matter, except lithographic; composed of papers named in par. 1405 -----	\$78,239	FRANCE, \$49,832; United Kingdom, \$25,026
Tourist literature:		
Of bona fide foreign authorship --	<u>1</u> /199,411	CANADA, \$55,141; United Kingdom, \$54,734; Brazil, \$31,034
Not of bona fide foreign author- ship, including drawings, engravings, photographs, etch- ings, maps, and charts, contain- ing text conveying travel, etc., information <u>2</u> / -----	39,535	CANADA, \$29,206; Poland and Danzig, \$2,567; United Kingdom, \$2,205
Printed matter, n.s.p.f.:		
Of bona fide foreign authorship --	147,126	UNITED KINGDOM, \$60,865; Germany, <u>3</u> /19,462; Canada, \$18,113
Of other than bona fide foreign authorship -----	71,166	CANADA, \$23,011; UNITED KINGDOM, \$10,091; Germany, <u>3</u> / \$11,712

1/ Includes \$92,274 duty-free under special provision (World's Fair).

2/ It should be noted that this statistical class includes two tariff classes given on the first page of this digest.

3/ Includes Austria.

Source: Official statistics of the U. S. Department of Commerce.

LABELS, FLAPS, AND CIGAR BANDS, LITHOGRAPHICALLY PRINTED

FRANCE
CUBA

Stat. import classes (1939): 9521.0, 9521.1, 9521.3, 9521.4

United States production, exports, and imports, 1937-39 and 1943

Year	Production	Domestic exports	Imports for consumption from--				
			All countries	CUBA	FRANCE	United Kingdom	Canada
Quantity (pounds)							
1937	Not avail- able	Not avail- able	43,602	19,274	5,208	4,965	863
1938			67,701	23,998	15,292	20,222	964
1939			41,690	22,215	9,377	3,993	1,541
1943			26,188	22,594	15	882	276
Value (dollars)							
1937	1/ 24,928,571	Not avail- able	47,665	20,441	7,787	6,740	1,056
1938	n.a.		54,867	24,034	15,456	10,478	1,240
1939	1/ 27,087,099		36,389	19,649	7,450	4,917	1,552
1943	n.a.		29,149	25,372	87	2,381	139

1/ Data include value of all lithographed labels and tags and seals; value of cigar bands, labels, and flaps included in total is estimated at \$2,000,000.

Source: Official statistics of the U. S. Department of Commerce, except as estimated.

<u>Item</u>	<u>United States tariff</u>		<u>Proposed</u>
	<u>Act of</u>	<u>1945</u>	<u>negotiating</u>
	<u>1930</u>	<u>rate</u>	<u>country</u>
	<u>Cents per pound</u>		
Par. 1406:			
**labels, flaps, cigar bands **			
lithographically printed, **			
n.s.p.f.:			
Printed in less than 8 colors			
(bronze printing to be			
counted as two colors),			
but not printed in metal			
leaf:			
Cigar bands -----	35	35	CUBA
Labels and flaps 1/ -----	30	30	FRANCE, CUBA
Printed in 8 or more colors			
(bronze printing to be			
counted as two colors), but			
not printed in metal			
leaf :			
Cigar bands -----	50	50	CUBA
Labels and flaps 1/ -----	40	40	FRANCE, CUBA
1/ Other than those "not exceeding 10 square inches in dimensions, if embossed			
or die cut."			

Note.- The ad valorem equivalents of the specific duties shown above on total imports entered in 1939 under each rate were as follows:

Cigar bands printed in less than 8 colors: practically all from Cuba, dutiable at 28 cents a pound, 17 percent ad valorem.

Labels and flaps printed in less than 8 colors: imports from Cuba, dutiable at 24 cents a pound, 29 percent; imports from all other countries, dutiable at 30 cents a pound, 34 percent.

Cigar bands printed in 8 or more colors: all from Cuba; dutiable at 40 cents a pound, 63 percent.

Labels and flaps printed in 8 or more colors: imports from Cuba, dutiable at 32 cents a pound, 26 percent; imports from all other countries, dutiable at 40 cents a pound, 75 percent.

LABELS, FLAPS, AND CIGAR BANDS, LITHOGRAPHICALLY PRINTED--Continued

Labels are used on boxes, bottles, cans, and other containers, for marking and identifying articles, and for advertising, and similar purposes. Flaps are types of labels consisting of sheets for covering the top layer of boxed articles. In the boxing of cigars, the flap is pasted to the hinged inner side of the box and so folded as to cover the top layer of cigars. Cigar bands are the small ribbons of paper used for encircling individual cigars to indicate the brand. These articles are produced both lithographically and by other printing processes. The rate provisions treated in this digest relate only to lithographed labels, flaps, and bands, and do not include provisions covering these products if in whole or in part of metal leaf, or labels and flaps which if 10 square inches or less in area are embossed or die cut. Imports of these excepted lithographed items are very small. The rates on bands apply specifically to cigar bands, but the provisions respecting labels and flaps are not restrictive to those used in packaging cigars. Generally speaking, larger-type labels such as canners', beverage bottlers', brewers', cigar box, and similar types are lithographed, while the smaller types, such as embossed labels, drug labels, gummed labels, and seals, are printed typographically. Cigar bands are usually lithographed.

Production data given in the table above covers all types of lithographed labels, but the types covered by the provisions here discussed comprise the greater part of the total. The value of cigar bands, labels, and flaps is not separately reported, but it is estimated that production of these items, included in the total, averages around 2 million dollars annually. About 150 domestic lithographic concerns produce labels in substantial volume. Production is widely dispersed, with important centers in New York, California, Illinois, New Jersey, Maryland, Ohio, and Wisconsin. Cigar bands and labels are manufactured by about 8 establishments, most of them in the vicinity of New York.

Total imports of labels, flaps, and cigar bands constitute a fraction of 1 percent of domestic production.

Imports consist chiefly of cigar labels, flaps, and bands from Cuba, the total value of bands being considerably smaller than that of labels and flaps. Prewar imports from France were principally cosmetic and perfume labels. Imports of the general line of labels are relatively small. Before 1933, total imports (then mostly from Germany) were much larger than in later years. The decline in imports started before 1933, and was largely caused by decreased production of cigars and by the elimination of numerous separate brands following consolidations among cigar producers. This latter fact, since it meant large orders for particular designs of bands and labels, rather than smaller orders for numerous designs, favored the placing of orders with the domestic industry. Another factor was the boycott on German goods which developed several years before the beginning of the war.

Labels are not shown separately in export statistics. There are small exports of cigar bands and labels, and substantial quantities of labels for milk cans, bottle, and other purposes are exported, but the total is only a small proportion of total lithographic exports and a small percentage of domestic production.

LABELS, FLAPS, AND CIGAR BANDS, LITHOGRAPHICALLY PRINTED--Continued

Labels, flaps, and cigar bands, lithographically printed: United States imports for consumption, by kind, with principal sources, 1939

Kind	:	Total	:	Principal sources
	:	value	:	
Cigar bands:	:	:	:	
Printed in less than 8 colors <u>1</u> / -:	:	\$1,053	:	CUBA, \$1,040; Canada, \$13
Printed in 8 or more colors <u>1</u> / ---:	:	58	:	CUBA, \$58
Labels and flaps, n.e.s.:	:	:	:	
Printed in less than 8 colors <u>1</u> / -:	:	31,208	:	CUBA, \$15,373; FRANCE, \$6,822;
	:		:	United Kingdom, \$4,856; Canada,
	:		:	\$1,402
Printed in 8 or more colors <u>1</u> / ---:	:	4,070	:	CUBA, \$3,178; FRANCE, \$628;
	:		:	Canada, \$137; Japan, \$66; United
	:		:	Kingdom, \$61

1/ Not printed in whole or in part in metal leaf.

Source: Official statistics of the U. S. Department of Commerce.

DECALCOMANIAS

Stat. import classes (1939): 9522.2, 9522.3

United States production, exports, and imports, 1937-39 and 1943

Year	Production	Domestic exports	Imports for consumption from--			
			All countries	Germany <u>1/</u>	UNITED KINGDOM	Canada
			Quantity (pounds)			
1937 -----	Not avail- able	Not avail- able	8,375	1,519	6,267	532
1938 -----			6,788	490	6,173	115
1939 -----			7,503	1,544	4,030	1,763
1943 -----			820	-	100	679
			Value (dollars)			
1937 -----	n.a.	Not avail- able	14,820	4,549	9,331	780
1938 -----	n.a.		10,107	1,538	7,775	778
1939 -----	<u>2/</u> 7,421,796		12,876	5,047	5,039	2,384
1943 -----	n.a.		2,441	-	644	1,649

^{1/} Includes Austria beginning 1938.^{2/} Production includes decalcomanias of all types, but bulk of output is of types similar to those covered by the tariff provision here considered.

Source: Official statistics of the U. S. Department of Commerce.

Item	United States tariff		Proposed negotiating country
	Act of 1930	1945 rate	
	Cents per pound		

Par. 1406

*** articles composed wholly or in chief value of paper lithographically printed, n.s.p.f.:

Decalcomanias, except toy decalcomanias and decalcomanias in ceramic colors:

If backed with metal leaf -----	65	65	UNITED KINGDOM
If not backed with metal leaf -----	40	40	do.

Note.- The duty of 65 cents per pound was equivalent, on total imports in 1939, to 46 percent ad valorem; the duty of 40 cents per pound, to 20 percent ad valorem.

Comment

Decalcomanias, also known as transfers and dry transfers, are designs, pictures, or lettering, lithographically printed on paper coated with starch and gum in such manner that they may be transferred from the paper to other surfaces of wood, metal, glass, pottery, plastics, or similar material. Cold, or commercial, decalcomanias are the only ones covered by the provision considered in this digest. (The other basic class consists of ceramic decalcomanias, printed in mineral colors, for pottery decoration; toy decalcomanias, not covered in this paragraph, are classified as toys.) Cold decalcomanias predominate in domestic output and use, but before the war were of much less importance in imports than ceramic decalcomanias, which came chiefly from Germany.

DECALCOMANIAS-Continued

Cold decalcomanias are used for decorative and utility purposes, such as for decoration of furniture, for window and door signs, truck lettering, and marking vehicles, instruments, etc. Some decalcomanias serve much the same purposes as transparencies (see separate digest on transparencies). Decalcomanias backed with metal leaf cost substantially more to produce than those of similar design not backed with metal leaf, and are dutiable at a higher rate than those not so backed. Lithography is the usual printing process employed, but there is substantial output by the silk screen process.

About 50 to 60 domestic establishments produce cold decalcomanias. They range in size from small concerns filling local orders, or producing a small number of specialties, to a few relatively large establishments doing a nation-wide business in practically all varieties. Illinois, Ohio, New York, and California are the more important producing areas, but there is some production in numerous other States. The output consists in large measure of proprietary matter specially designed and produced on specific orders, but in part comprises general designs for over-the-counter sale. The domestic industry is well established and sharply competitive, and capable of meeting all demands for decalcomanias of this class. It has an advantage over foreign production in supplying the domestic demand in that the general character of the product requires close cooperation between the producer and consumer in developing designs, and because quick delivery is usually desired.

Imports are insignificant in comparison with domestic production. Leaf backed decalcomanias predominated in imports before 1939. They were imported chiefly from the United Kingdom and consisted largely of proprietary designs imported for its own use by an American manufacturing concern having foreign affiliations.

It is probable that exports of decalcomanias of this type are somewhat larger than imports, but they are not separately reported in export statistics from other lithographically printed matter.

TRANSPARENCIES

Stat. import classes (1939): 9522.4 and 9522.5

United States production, exports, and imports, 1937-39 and 1943

Year	Production	Domestic exports	Imports for consumption from--			
			All countries	BELGIUM	Netherlands	Germany ^{1/}
	Quantity (pounds)					
1937 -----	Not avail- able	Not avail- able	899	746	-	10
1938 -----			618	491	-	52
1939 -----			1,208	1,093	75	40
1943 -----			<u>2/</u> 75	-	-	-
	Value (dollars)					
1937 -----	n.a.	Not avail- able	1,963	1,730	-	29
1938 -----	n.a.		1,376	1,189	-	69
1939 -----	<u>3/</u> 250,000		2,874	2,798	59	17
1943 -----	<u>3/</u> 250,000		<u>2/</u> 176	-	-	-

^{1/} Includes Austria beginning 1938.

^{2/} All from Soviet Union.

^{3/} Estimated.

Source: Official statistics of the U. S. Department of Commerce, except as noted.

Item	United States tariff		Proposed negotiating country
	Act of	1945	
	1930	rate	
Par. 1406	Percent ad valorem		
*** transparencies, printed lithographically or otherwise:			
In not more than five printings (bronze printing to be counted as two printings) -----	45	^{1/} 30	BELGIUM
In more than five printings (bronze printing to be counted as two printings) -----	50	^{1/} 37 ¹ / ₂	do.
^{1/} Trade agreement with Belgium, effective May 1935.			

Comment

Transparencies are advertising signs, usually lithographically printed on very thin paper (onionskin), which are pasted on the glass of windows, doors, and store fixtures where they may be read either by direct or indirect light. Usually they are in multicolor; separate plates or stones and separate printings are required for each color. The tariff provision distinguishes between the number of printings rather than the number of colors because some of the colors, in order to give them body, are printed more than once. Certain types of decalcomanias are widely used for window signs and serve much the same purposes as transparencies. (See separate digest on decalcomanias).

Domestic production of transparencies probably does not exceed \$250,000 per year. They are made by only a very few domestic concerns, only one or two of which make them as the principal product. The others manufacture them in association with decalcomanias or other lithographic matter.

TRANSPARENCIES-Continued

Imports are small, and have not exceeded \$10,000 a year since the passage of the Tariff Act of 1930. They are not stock articles, but like those produced in the United States, are printed on specific orders from special designs. The designs of the import products are usually of domestic creation.

Exports are small, and probably consist of advertising media for exported domestic products.

The reduction in duty by the trade agreement with Belgium, effective May 1935, had no substantial effect on imports. Although imports in recent years have been somewhat larger than in 1933 and 1934, they have been considerably smaller than in 1932 and 1931.

POST CARDS

Stat. import classes (1939): 953.40, 953.48, 953.49, 953.50, 953.51, 953.60

United States production, exports, and imports, 1937-39 and 1943

Year	Production	Domestic exports	Imports for consumption from--				
			All countries	Switzerland	UNITED KINGDOM	Italy	Japan
Quantity (pounds)							
1937	Not avail- able	Not avail- able	21,263	3,997	3,602	6,042	467
1938			21,012	5,834	3,721	4,474	273
1939			<u>1</u> 21,330	7,760	3,233	1,312	3,503
1943			3,035	2,481	9	-	-
Value (dollars)							
1937	n.a.	Not avail- able	27,761	3,600	3,654	6,327	221
1938	n.a.		20,258	5,708	3,572	4,635	265
1939	<u>2</u> 2,605,659		18,693	7,658	3,599	1,380	1,120
1943	n.a.		4,572	3,633	9	-	-

1/ Imports of 29 thousand post cards reported in class 953.51 converted at 6 pounds per thousand. 2/ Souvenir cards.

Source: Official statistics of the U. S. Department of Commerce.

Item	United States tariff		Proposed negotiating country
	Act of 1930	1945 rate	
Par. 1406			
** cards, composed wholly or in chief value of paper lithographically printed *** (except *** views of American scenery or objects ***), not specially provided for ***:			
Postcards:			
Not exceeding 12/1000 inch in thickness -----	30¢ lb.	30¢ lb.	UNITED KINGDOM
Exceeding 20/1000 inch in thickness: 1/			
Valued at not more than 35¢ per pound -----	8-3/4¢ lb.	8-3/4¢ lb.	do.
Valued at more than 35¢ per pound -----	8-3/4¢ lb.	6¢ lb. 2/	do.

Continued on following page.

POST CARDS--Continued

<u>Item</u>	<u>United States tariff</u>		<u>Proposed negotiating country</u>
	<u>Act of 1930</u>	<u>1945 rate</u>	
Par. 1410			
** all post cards (not includ- ing American views), plain, decorated, embossed, or printed except by litho- graphic process.	30% ad. val.	30% ad val.	UNITED KINGDOM
views of any landscape, scene, building, place, or locality in the United States, on cardboard or paper,* by whatever process printed or produced, including those wholly or in part produced by either lithographic or photogelatin process ***.			
Post cards:			
Not thinner than 8/1000 inch - 15¢ lb.+	25% ad val.	15¢ lb.+ 25% ad val.	do.
Thinner than 8/1000 inch -----	\$2 thous.	\$2 thous.	do.

1/ Post cards over 12/1000 through 20/1000 inch thick are not considered in this digest. Imports of post cards of this thickness are small, and before the war came almost entirely from Germany and Switzerland.

2/ Trade agreement with United Kingdom, effective January 1939.

Note.- The duty of 30 cents per pound was equivalent, on total imports in 1939, to 52 percent ad valorem; the duty of 8-3/4 cents per pound was equivalent to 83 percent; the duty of 6 cents per pound was equivalent to 4 percent; the duty of 15 cents per pound and 25 percent ad valorem was equivalent to 40 percent; and the duty of \$2 per thousand was equivalent to 16 percent.

Comment

Post cards are printed by letterpress, lithographic and gravure processes, and photography.

Imported post cards are subject to 12 different rate brackets. They are specifically mentioned only in paragraph 1410 (post cards, except lithographed cards and American views); the other 11 classifications come under the provisions for all other lithographically-printed articles, not specially provided for (par. 1406), and views of American scenery, localities, etc. (par. 1410). In this digest, 6 of the 12 classifications are considered, namely, all except lithographed cards between 12/1000 and 20/1000 inch thick. The production data cover all classes of cards, however, it not being possible to separate the types covered by the tariff classification here considered.

Trade directories list about 20 domestic producers of post cards, but it is likely that the bulk of production is accounted for by only a few of these concerns. Demand for post cards is influenced mainly by general economic conditions affecting tourist and vacation travel. Wartime decline in tourist travel was probably more than offset by the use of cards by personnel of the armed forces.

Imports consist in part of cards of foreign characteristics, some with foreign language text, and in part of cards bearing American views or otherwise similar to domestic products. Imports from the United Kingdom and Germany

POST CARDS—Continued

consist generally of printed cards; cards from Switzerland are lithographed. Imports under the thicknesses not considered herein are normally less than half as large as the other six classes, but in 1943 were considerably larger. In 1939 imports of the classes under consideration were less (in value) than 1 percent of the domestic production of all post cards in that year.

Exports have not been separately reported since 1932. In that year they amounted to \$36,344, a decline from \$251,796 in 1929 and \$202,676 in 1930. Canada was the principal market. The Canadian general tariff on post cards was raised in 1931, but was reduced in the 1936 and 1939 trade agreements with the United States. Canadian imports of picture post cards, greeting cards, and other artistic cards from the United States were considerably higher in 1938 and 1939 than in the early 1930's.

Post cards: United States imports for consumption, by kind, with principal sources, 1939

Kind	Total value	Principal sources
Post cards; lithographically printed (except American views):		
Not exceeding 12/1000 inch in thickness.	\$778	Mexico, \$308; Germany, ^{1/} \$137; Japan, \$133; Soviet Union, \$122; Switzerland, \$20
Exceeding 20/1000 inch in thickness:		
Valued not more than 35¢ per pound.	73	Japan, \$73
Valued more than 35¢ per pound.	87	Switzerland, \$70
American views, by whatever process printed:		
Not thinner than 8/1000 inch, 35 square inches or less.	7,318	Switzerland, \$6,990; UNITED KINGDOM, \$228; Italy, \$63
Thinner than 8/1000 inch —	353	Germany, \$353 ^{1/}
Post cards (except American views), plain, decorated, embossed, or printed, except by the lithographic process.	10,084	UNITED KINGDOM, \$3,371; Italy, \$1,317; France, \$949; Japan, \$914; Soviet Union, \$622; Switzerland, \$578

^{1/} Includes Austria.

Source: Official statistics of the U. S. Department of Commerce.

LITHOGRAPHIC PRINTS, NOT SPECIALLY PROVIDED FOR

Stat. import classes (1939): 953.70, 953.78, and 953.79

United States production, exports, and imports, 1937-39 and 1943

Year	Production ^{1/}	Domestic exports ^{1/}	Imports for consumption from--				
			All countries	Germany ^{2/}	Italy	UNITED KINGDOM	Nether-lands
	Quantity (pounds)						
1937	Not	Not	210,320	33,508	14,612	24,454	15,605
1938	avail-	avail-	186,428	40,788	18,121	16,030	14,779
1939			191,958	26,863	24,321	18,105	32,521
1943	able	able	^{3/} 33,792	93	-	3,734	1,171
	Value (dollars)						
1937	96,633,006	2,043,737	193,326	54,239	20,545	33,644	14,262
1938	n.a.	1,834,462	187,931	69,513	30,668	27,223	13,561
1939	99,671,371	1,786,290	192,814	47,507	42,023	30,213	30,116
1943	n.a.	1,847,971	^{3/} 79,022	821	-	37,935	548

^{1/} Production and exports are not directly comparable with imports (see text).^{2/} Includes Austria beginning 1938.^{3/} Includes 10,955 pounds, valued at \$21,194 imported from Switzerland.

Source: Official statistics of the U. S. Department of Commerce.

ItemUnited States tariffProposed
negotiating
country

<u>Act of</u>	<u>1945</u>
<u>1930</u>	<u>rate</u>
	<u>Cents per pound</u>

Par. 1406

Lithographic prints, n.s.p.f.:

Not exceeding 12/1000 inch in
thickness -----

30

30

UNITED KINGDOM

Exceeding 20/1000 inch in
thickness:

Valued not more than 35¢ pound 8-3/4 8-3/4

do.

Valued more than 35¢ pound ---- 8-3/4 1/6

do.

^{1/} Trade agreement with the United Kingdom, effective January 1939.

Note.- The ad valorem equivalents of the specific duties shown above on total imports entered in 1939 under each rate were as follows:

30 cents a pound, 26 percent ad valorem

8-3/4 cents a pound (on prints valued not more than 35 cents a pound),
51 percent8-3/4 cents a pound (on prints valued more than 35 cents a pound,
applicable to imports from Germany only), 14 percent6 cents a pound (on prints valued more than 35 cents a pound, applicable
to imports from countries other than Germany), 9 percent.

LITHOGRAPHIC PRINTS, NOT SPECIALLY PROVIDED FOR--Continued

Comment

Lithographically printed articles, n.s.p.f., include a wide variety of prints, pictures, and designs for advertising, commercial, and artistic purposes; financial, legal, and general business forms and blanks; and designs, patterns, sample books, and similar industrial prints. They may be printed in black and white or in single and multiple colors, and on paper or board of practically any thickness. This digest does not cover prints on paper between 12/1000 inch and 20/1000 inch in thickness.

The domestic industry is extensive, and its production includes practically all classes of articles. Production is widely distributed throughout the country, New York, Illinois, Ohio, California, and Pennsylvania being the leading producing States. Work is usually done on a job or contract basis to individual order, but some calendars, hangers, art prints, etc., are also made for the general market. The value of domestic production shown in the table above is more comprehensive than the products covered by the tariff provisions, both in the matter of thickness and in other respects. It also includes numerous classes of article which, though covered by the tariff provision, do not customarily enter our import trade. Since imports consist almost wholly of color lithographs, a better idea of the relative size of domestic production and imports can be gained by comparing the total imports of \$193,000 in 1937 (or 1939) with the domestic output of color lithographs, which was around \$43,000,000 in each of these years. On this basis imports were less than one-half of 1 percent of domestic production.

Imports of the color lithographs which constitute the bulk of the trade include stock advertising media for imprinting with local names in this country, direct advertising matter relating to imported products, religious cards and prints, art prints and pictures, and certain types of packaging items not classifiable as labels. They compete with only a small proportion of the domestic output, and in many classes of imports there is no direct competition. Competition between domestic and imported articles is most direct in the cheaper types of commercial prints such as are used for advertising, etc.

Exports of lithographed matter of the types here considered are probably considerably larger than imports, although they are not separated from other lithographed articles in export statistics. They consist largely of advertising matter, much of it being proprietary articles relating to exported domestic products and motion pictures, but also include general advertising media of stock types exported under general commercial conditions. Exports are widely distributed but Canada and the United Kingdom are the principal markets.

On only one of the three classes of lithographically printed articles herein considered has the duty been reduced, namely, about a 30 percent reduction to the United Kingdom on articles exceeding 20/1000 inch thick and valued at more than 35 cents per pound. Imports in this class have been very small.

LITHOGRAPHIC PRINTS, NOT SPECIALLY PROVIDED FOR--Continued

Lithographic prints, not specially provided for: United States imports
for consumption, by kind, with principal sources, 1939

Kind	Total value	Principal sources
All other lithographic prints, n.s.p.f. (except post cards):		
Not over 12/1000 inch in thickness --:	\$183,662	Germany, ^{1/} \$46,278; Italy, \$42,008; UNITED KINGDOM, \$29,377
Exceeding 20/1000 inch in thickness::		
Valued not more than 35 cents pound -----:	4,715	Japan, \$1,849; France, \$867; Switzerland, \$621;* * UNITED KINGDOM, \$83
Valued more than 35 cents pound --:	4,427	Switzerland, \$1,376; Germany, \$1,223; UNITED KINGDOM, \$753

^{1/} Includes Austria.

Source: Official statistics of the U. S. Department of Commerce.

WRITING, LETTER, AND NOTE PAPER AND CORRESPONDENCE CARDS

Stat. import classes (1939): 4724.0, 4724.1, 4724.2, 4724.3

United States production, exports, and imports, 1937-39 and 1943

Year	Production	Domestic exports	Imports for consumption from--			
			All countries	UNITED KINGDOM	Canada	Japan
	Quantity (1,000 pounds)					
1937 ———	1,156,294	36,232	236	46	53	60
1938 ———	963,438	27,308	153	28	24	41
1939 ———	1,189,188	37,972	161	31	29	56
1943 ———	1,488,666	<u>1/</u> 91,376	<u>2/</u> 65	5	59	—
	Value (1,000 dollars)					
1937 ———	87,272	2,988	63	18	10	16
1938 ———	n.a.	2,101	37	10	6	8
1939 ———	83,973	2,522	38	11	9	9
1943 ———	n.a.	<u>1/</u> 9,942	<u>2/</u> 16	3	13	—

1/ Includes 33,752 thousand pounds valued at 3,423 thousand dollars exported under lend-lease.2/ Includes 33 thousand pounds valued at 5 thousand dollars free as an act of international courtesy.

Source: Official statistics of the U. S. Department of Commerce.

Item	United States tariff		Proposed negotiating country
	Act of 1930	1945 rate	
Par. 1407(a) Correspondence cards, and writing; letter and note paper (weighing 8 pounds or over per ream: <u>1/</u> Not ruled, bordered, embossed, printed, lined, or decorated: In rolls, or in sheets 110 square inches or more in area - 3¢ lb. + 15%		3¢ lb. + 15%	UNITED KINGDOM
In sheets less than 110 square inches in area -----	3¢ lb. + 20%	3¢ lb. + 20%	do.
Ruled, bordered, embossed, printed, lined, or decorated: In rolls, or in sheets 110 square inches or more in area -----	3¢ lb. + 25%	3¢ lb. + 25%	do.
In sheets less than 110 square inches in area -----	3¢ lb. + 30%	3¢ lb. + 30%	do.

1/ Ream of 107,000 square inches.

Note.- See table at the end of digest for equivalent specific and equivalent ad valorem of each of the several rates of duty.

WRITING, LETTER, AND NOTE PAPER AND CORRESPONDENCE CARDS--Continued

Comment

Writing, letter, and note paper and correspondence cards are specifically designed for use in writing or printing. As indicated in the tariff language, writing paper is made in a wide variety of weights, colors, sizes, and finishes. Papers of this group may be manufactured wholly of rag, or of chemical wood pulp, or of mechanically ground wood, or they may be produced by blending several kinds of pulp.

This country is the world's largest producer and consumer of writing paper. It is made by approximately 100 mills with a considerable concentration in Massachusetts, Wisconsin, Michigan, and Ohio. Many of these mills make one or more kinds of pulp and may buy additional kinds and grades to meet their requirements. Production data shown embrace the writing paper group, as a whole, including bonds, ledgers, manifold, mimeograph, papeterie, and wedding.

Imports were very small in comparison with domestic production in immediate prewar years. They were principally of the better grades of paper, ruled, bordered, or decorated. The average foreign value of total imports in 1939 was 25 cents per pound, or over three times the average value of the domestic product.

United States annual exports of writing paper as a whole in prewar years were equivalent to about 3 percent of domestic output. During the war many countries were cut off from their normal European sources of supply, and United States exports increased to around 7 percent of production. It is believed that only a very small part if any of the increase in exports during the war will remain permanent.

Writing, letter, and note paper and correspondence cards: United States imports for consumption, by kind, with principal sources, 1939

Kind	Specific : Ad valorem:		Foreign value	Principal sources
	equivalent equivalent:			
	of the : of the :			
	rate of : of the :			
	duty	duty		
	Cents	Percent		
	per pound:			
Not ruled, bordered, embossed, printed, lined, or decorated:				
In rolls or in sheets 110 square inches or more in area.	6	31	\$9,681	Germany, ¹ / ₃ \$3,152; France, \$1,942; Japan, \$1,649; Canada, \$1,179; UNITED KINGDOM, \$673
In sheets less than 110 square inches in area.	10	29	1,098	UNITED KINGDOM, \$589; France, \$241; Japan, \$133
Ruled, bordered, embossed, printed, lined, or decorated:				
In rolls or in sheets 110 square inches or more in area.	8	39	8,545	Canada, \$2,698; Japan, \$2,483; UNITED KINGDOM, \$2,299
In sheets less than 110 square inches in area.	12	41	18,652	UNITED KINGDOM, \$7,022; Canada, \$5,559; Japan, \$4,808

^{1/} Includes Austria.

Source: Official statistics of the U. S. Department of Commerce.

DRAWING PAPER

Par. No. 1407(a)
UNITED KINGDOM

Stat. import classes (1939): 4724.41, 4724.42, 4724.51, 4724.52

United States production, exports, and imports, 1937-39 and 1943

Year	Pro- duction <u>1/</u>	Domestic exports	Imports for consumption from--				
			All countries	Germany <u>2/</u>	UNITED KINGDOM	France	Italy
	Quantity (1,000 pounds)						
1937 -	12,700	Not avail- able	951	764	117	36	7
1938 -	13,000		582	451	95	22	5
1939 -	13,500		600	427	111	46	6
1943 -	13,000		59	-	59	-	-
	Value (1,000 dollars)						
1937 -	675	Not avail- able	313	235	61	9	2
1938 -	700		194	138	48	6	2
1939 -	750		199	133	53	11	1
1943 -	600		33	-	33	-	-

^{1/} Estimated from unpublished trade information.^{2/} Includes Austria beginning 1938.

Source: Official statistics of the U. S. Department of Commerce, except as noted.

Item	United States tariff		Proposed negotiating country
	Act of 1930	1945 rate	
Par. 1407(a)			
Drawing paper, weighing 8 pounds or over per ream:			
Not ruled, bordered, embossed, printed, lined, or decorated in any manner:			
Valued less than 40¢ lb. -----	3¢ lb.+ 15% ad val.	3¢ lb.+ 15% ad val.	UNITED KINGDOM
Valued not less than 40¢ lb. -	3¢ lb.+ 15% ad val.	2¢ lb.+ 10% ad val. ^{1/}	
Ruled, bordered, embossed, printed, lined, or decorated in any manner other than lithographically:			
Valued less than 40¢ lb. -----	3¢ lb.+ 25% ad val.	3¢ lb.+ 25% ad val.	do.
Valued not less than 40¢ lb. -	3¢ lb.+ 25% ad val.	2¢ lb.+ 20% ad val. ^{1/}	

^{1/} Trade agreement with United Kingdom, effective January 1939.

Note.- The compound duty of 3 cents a pound plus 15 percent ad valorem on drawing paper not ruled, etc., and valued at less than 40 cents a pound imported in 1939 was equivalent to 26 percent ad valorem or 7 cents a pound; on similar paper valued at 40 cents or more a pound the duty of 2 cents a pound plus 10 percent ad valorem was equivalent to 16 percent ad valorem or 8 cents a pound. The duty of 3 cents a pound plus 25 percent ad valorem on drawing paper ruled, etc., valued at less than 40 cents a pound imported in 1939 was equivalent to 34 percent ad valorem or 11 cents a pound; on similar paper valued at 40 cents or more a pound the duty of 2 cents a pound plus 20 percent ad valorem was equivalent to 27 percent ad valorem or 16 cents a pound.

BRISTOL BOARD

Stat. import classes (1939): 4724.61, 4724.62, 4724.71, 4724.72

United States production, exports, and imports, 1937-39 and 1943

Year	Production	Domestic exports	Imports for consumption from--				
			All countries	NETHER- LANDS	United Kingdom	Belgium	Germany ^{1/}
Quantity (1,000 pounds)							
1937	147,078	3,111	156	118	6	24	1
1938	104,446	2,603	74	54	6	12	-
1939	158,948	2,592	147	87	7	43	10
1943	198,252	2/ 7,731	-	-	-	-	-
Value (dollars)							
1937	8,444,593	183,799	19,126	10,421	5,044	2,069	262
1938	n.a.	196,399	11,347	4,854	4,503	1,177	-
1939	8,989,582	187,998	16,683	7,402	4,948	2,958	1,355
1943	n.a.	2/ 746,270	-	-	-	-	-

^{1/} Includes Austria beginning 1938.^{2/} Includes 634 thousand pounds valued at \$54,483 exported under lend-lease.

Source: Official statistics of the U. S. Department of Commerce.

Item	United States tariff		Proposed negotiating country
	Act of 1930	1945 rate	
Par. 1407 (a)			
Bristol board of the kinds made on a Fourdrinier or a multi-cylinder machine, weighing 8 pounds or over per ream:			
Not ruled, bordered, embossed, printed, lined, or decorated:			
Valued at not more than 15 cents per pound -----	3¢ lb.+ 15% ad val.	2¢ lb.+ 10% ad val. ^{1/}	NETHERLANDS
Valued at more than 15 cents per pound -----	3¢ lb.+ 15% ad val.	3¢ lb.+ 15% ad val.	do.
Ruled, bordered, embossed, printed, lined, or decorated other than by the lithographic process:			
Valued at not more than 15 cents per pound -----	3¢ lb.+ 25% ad val.	3¢ lb.+ 20% ad val. ^{1/}	do.
Valued at more than 15 cents per pound -----	3¢ lb.+ 25% ad val.	3¢ lb.+ 25% ad val.	do.

^{1/} Trade agreement with the Netherlands, effective February 1936.

Note.— The ad valorem equivalents of the above duties were as follows in 1939:

Not ruled, etc.:

Valued at not more than 15 cents per pound ----- 35 percent

Valued at more than 15 cents per pound ----- 19 percent

Ruled, etc.:

Valued at not more than 15 cents per pound ----- 50 percent

Valued at more than 15 cents per pound ----- 45 percent

BRISTOL BOARD--Continued

Comment

Bristol boards are divided into three principal groups, index, mill, and wedding; a fourth group known as "bogus" or "ticket" bristol is sometimes added. Index bristol (used typically for making index cards) may be made on either a cylinder or Fourdrinier machine of homogeneous stock, but is sometimes made by laminating two sheets of paper. It is sized and finished for writing upon with ink. Mill bristol is a cylinder-machine product of lower quality. It is used for a wide variety of purposes in writing and printing. Post card bristol is a type of light mill bristol containing no mechanical pulp and having a smooth, even surface suitable for pen or pencil or for use in printing. Wedding bristol, the highest quality, used for formal announcements and invitations, is very largely made by laminating two to four sheets of fine paper. Bogus bristol is a cylinder-machine product having a news or chip center and vat liners of higher quality, white or colored. It is used mainly for printing tickets, advertising, and similar material.

During the period immediately before the war the domestic output of bristol board ranged from 100 to 150 million pounds annually, but during the war it rose to over 200 million pounds. At the same time the larger proportion of the output changed from mill bristol for printing to index bristol, large quantities of which were required for war work. About 60 mills produce bristols, more than half of the total number being in Massachusetts, Michigan, and New York. The remainder are scattered in 15 other States, none being in the South.

Prewar imports were equal to a fraction of 1 percent of United States production, and came principally from the Netherlands and Germany; they were mostly boards not ruled, bordered, printed, or otherwise processed which were valued at not more than 15 cents a pound. Those not processed and of higher value came largely from the United Kingdom and were generally high-grade laminated wedding bristols. Imports ceased in 1941 and were not resumed for the duration of the war.

During the period 1937-39 exports of bristol board on the average were about 22 times larger than imports in terms of quantity and about 12 times larger in terms of value. The average unit value of exports was much lower than that of imports. Owing to the closing of European sources of supply, exports increased rapidly after the outbreak of the war. By 1943 the value of exports was about four times that of 1939 and represented between 5 and 10 percent of the total value of domestic production. The most important export markets are Canada, Cuba, Mexico, and the Latin American Republics generally.

BRISTOL BOARD--Continued

Bristol board: United States imports for consumption, by kinds, with principal sources, 1939

Kind	Total value	Principal sources
Ruled, bordered, embossed, lined, or decorated, etc.:		
Valued at not more than 15 cents per pound -----	\$954	Germany, ^{1/} \$626; Belgium, \$328
Valued at more than 15 cents per pound -----	649	Germany, ^{1/} \$649
Not ruled, bordered, embossed, lined, or decorated, etc.:		
Valued at not more than 15 cents per pound -----	10,032	NETHERLANDS, \$7,402; Belgium, \$2,630
Valued at more than 15 cents per pound -----	5,048	United Kingdom, \$4,948; Germany, \$80; Canada, \$20

^{1/} Includes Austria.

Source: Official statistics of the U. S. department of Commerce.

HAND-MADE PAPER VALUED AT LESS THAN 50 CENTS A POUND

Stat. import classes (1939): 4724.81 and 4724.85

United States production, exports, and imports, 1937-39 and 1943

Year	Production	Domestic exports	Imports for consumption from--				
			All countries	Japan	UNITED KINGDOM	China	Nether-lands
	Quantity (pounds)						
1937	Negli- gible	N	n.a.			-	-
1938		O	n.a.			-	-
1939		N	41,076	17,464	3,351	8,409	5,150
1943		E	1/ 2,860	-	432	-	-
	Value (dollars)						
1937	Negli- gible	N	n.a.				
1938		O	n.a.				
1939		N	11,045	5,498	1,317	1,313	1,240
1943		E	1/ 525	-	208	-	-

1/ Canada was the only other source in 1943.

Source: Official statistics of the U. S. Department of Commerce.

<u>Item</u>	<u>United States tariff</u>		<u>Proposed</u> <u>negotiating</u> <u>country</u>
	<u>Act of</u> <u>1930</u>	<u>1945</u> <u>rate</u>	
Par. 1407 (a)			
Hand-made paper, and paper commonly or commercially known as hand-made or machine hand-made paper, weighing 8 pounds or over per ream and valued at less than 50 cents a pound:			
Ruled, bordered, etc. -----	3¢ lb.+ 25% ad val.	3¢ lb.+ 25% ad val.	UNITED KINGDOM
Not ruled, bordered, etc. -----	3¢ lb.+ 15% ad val.	3¢ lb.+ 15% ad val.	do.

Note.-- The duty of 3 cents a pound and 25 percent ad valorem on total imports in 1939 of hand-made and machine hand-made paper, ruled, bordered, etc., valued at less than 50 cents a pound, was equivalent to 35 percent ad valorem or 11 cents a pound. The duty of 3 cents a pound and 15 percent ad valorem on total imports in 1939 of hand-made and machine hand-made paper not ruled, bordered, etc., valued at less than 50 cents a pound, was equivalent to 27 percent ad valorem or 7 cents a pound.

Comment

Hand-made paper is made in hand molds in single sheets. Deckled edges is a distinguishing characteristic. Imitation or machine "hand-made" paper is made on a paper machine and finished to resemble genuine hand-made paper. Both kinds are used for writing, drawing, and decorative purposes, none now being used for commercial printing except a negligible quantity which is used for lithographed or engraved greeting cards.

HAND-MADE PAPER VALUED AT LESS THAN 50 CENTS A POUND--Continued

Other than a negligible volume produced as a hobby by two or three individuals, no paper is made by hand in the United States. One or two manufacturers of writing paper occasionally finish a very small quantity of their machine output as imitation hand-made paper for further conversion into papeteries or other form of correspondence paper. The only known output is in the Northeastern States and none is known to be valued at less than 50 cents a pound.

Imports of hand-made and imitation hand-made paper valued at less than 50 cents a pound were not separately classified before 1939, but are estimated to have averaged less than \$15,000 in value annually for many years. Most of this paper came from Japan and China.

No hand-made or machine "hand-made" paper is known to be exported from the United States.

The domestic market for these papers is very limited.

Hand-made or machine hand-made paper weighing 8 pounds or over per ream and valued at less than 50 cents per pound: United States imports for consumption, by kind, with principal sources, 1939

Kind	Total value	Principal sources
Ruled, bordered, embossed, printed, lined, or decorated	\$3,300	Japan, \$3,157; China, \$143
Not ruled, bordered, embossed, printed, lined, or decorated	7,745	Japan, \$2,341; UNITED KINGDOM, \$1,317; Netherlands, \$1,240; China, \$1,170; Italy, \$886; France, \$785; Germany, \$6 1/2

1/ Includes Austria.

Source: Official statistics of the U. S. Department of Commerce.

PAPERS SIMILAR TO THOSE SPECIFICALLY PROVIDED FOR IN PARAGRAPH 1407 (a)

Stat. import classes (1939): 4724.91, 4724.95

United States production, exports, and imports, 1937-39 and 1943

Year	Production	Domestic exports	Imports for consumption from--				
			All countries	CANADA	Japan	United Kingdom	Germany ^{1/}
Quantity (pounds)							
1937	(Estimated	Not avail- able ^{2/}	194,002	8,725	52,904	12,846	59,083
1938	at 25-40		159,442	31,704	32,627	21,988	13,944
1939	million)		74,374	36,502	10,989	10,268	1,454
1943	n.a.		^{3/} 87,251	86,611	-	622	-
Value (dollars)							
1937	(Estimated	Not avail- able ^{2/}	49,851	2,470	15,508	4,774	11,420
1938	at 6-8		40,926	5,188	10,325	6,617	3,116
1939	million)		12,664	5,117	2,391	2,150	1,078
1943	n.a.		^{3/} 14,762	14,491	-	260	-

^{1/} Includes Austria beginning 1938.

^{2/} Probably several times larger than imports.

^{3/} Includes 26,150 pounds valued at \$3,020 free as an act of international courtesy from Canada.

Source: Official statistics of the U. S. Department of Commerce, except as noted

Item	United States tariff		Proposed negotiating country
	Act of 1930	1945 rate	
Par. 1407 (a)			
Papers similar to the following:			
Correspondence cards, writing, letter, note, drawing, and handmade paper, paper commonly or commercially known as hand-made or machine handmade paper, japan paper and imitation japan paper, Bristol board made on a Fourdrinier or multicylinder machine, ledger, bond, record, tablet, typewriter, manifold, onionskin, and imitation onion-skin paper; all the foregoing weighing 8 pounds or over per ream:			
Ruled, bordered, embossed, printed, lined, or decorated except lithographically -----	3¢ lb. + 25% ad val.	3¢ lb. + 25% ad val.	CANADA
Not ruled, bordered, embossed, printed, lined, or decorated	3¢ lb. + 15% ad val.	3¢ lb. + 15% ad val.	do.

Note.-- The compound duty of 3 cents a pound plus 25 percent ad valorem was equivalent, on total imports in 1939, to 32 percent ad valorem or to 13 cents a pound; the duty of 3 cents a pound plus 15 percent ad valorem was equivalent to 41 percent ad valorem or to 5 cents a pound.

PAPERS SIMILAR TO THOSE SPECIFICALLY PROVIDED FOR
IN PARAGRAPH 1407 (a)-Continued

Comment

Papers similar to those specifically named in paragraph 1407 (a) include a wide variety of different weights and finishes made of rag, chemical, or ground-wood pulp or mixtures of these, such as map and chart papers, unruled and ruled graph and engineering papers, light weight gumming and coating stock, facing paper, pattern paper except tissue, overlay and tympan papers, and special printing and writing papers. Most of these are specialty papers, the uses of which are indicated by their designations.

The output of these papers in the United States is not separately shown in statistics but is estimated to have been, during the period 1935-40, between 25 and 40 million pounds annually valued at 6 to 8 million dollars. Between 50 and 60 concerns make these papers, nearly all of them being in the Northeastern and Lake States. During the war the output of a number of these specialty papers increased because of war requirements, but after the end of the war most of the producing concerns reduced their volume in order to increase the quantity of pulp available for other papers.

The trend of imports before the war was generally downward. During the war imports from Germany and Japan ceased entirely and those from Canada and the United Kingdom became greater. Prewar imports were only a fraction of 1 percent of total consumption, and a considerable proportion of the imported material was for further conversion.

Exports have not been separately indicated in the statistics but are estimated to have averaged several times the volume of imports; for some specific types exports may have ranged from 2 to 4 percent of total output. The most important markets have been in the Latin American countries.

Papers similar to those named in paragraph 1407 (a):
United States imports for consumption, by kinds,
with principal sources, 1939

Kind	Total : value :	Principal sources
Ruled, bordered, embossed, lined, printed, or decorated except lithographically.	: \$5,598	: CANADA, \$2,049; United Kingdom, \$1,768; Germany, \$991; Japan, \$745
Not ruled, bordered, embossed, lined, printed, or decorated.	: 7,066	: CANADA, \$3,068; Japan, \$1,646; Switzerland, \$1,016

1/ Includes Austria.

Source: Official statistics of the U. S. Department of Commerce.

PAPETERIES

Stat. import class (1939): 4725.2

United States production, exports, and imports, 1937-39 and 1943

Year	Production	Domestic exports	Imports for consumption from--				
			All countries	FRANCE	United Kingdom	Yugo-slavia	Czecho-slovakia
	Quantity (pounds)						
1937	Not avail-able	330,876	Not avail-able				
1938		268,917					
1939		280,973					
1943		94,669					
	Value (dollars)						
1937	1/ 9,862,232	71,125	71,127	21,810	3,297	-	5,505
1938	n.a.	59,348	44,832	18,233	2,868	-	3,298
1939	9,746,253	62,753	28,470	19,029	2,913	2,848	1,791
1943	n.a.	42,020	2/ 9,827	-	1,186	-	-

1/ Includes other stationery.

2/ Includes papeteries valued at \$9,632 imported free as an act of international courtesy, principally from Canada.

Source: Official statistics of the U. S. Department of Commerce.

<u>Item</u>	<u>United States tariff</u>		<u>Proposed</u>
	<u>Act of</u>	<u>1945</u>	<u>negotiating</u>
	<u>1930</u>	<u>rate</u>	<u>country</u>
	<u>Percent ad valorem</u>		
Par. 1407 (b)			
Papeteries -----	40	1/ 30	FRANCE
1/ Trade agreement with France, effective June 1936.			

Comment

Papeteries consist of envelopes with matching note paper or cards packaged together in a single box, portfolio, or other type of container and manufactured and assembled for sale as a unit. The papers used are of a wide variety of color, size, finish, and decorative effects. The quality of paper used for papeteries ranges from that of high rag content to that made from low-cost ground wood, and prices range accordingly. The market for papeteries is closely related to the level of national income.

Papeteries are made both by converters who have no paper manufacturing facilities and by paper mills which operate a converting adjunct. The number of paper mills making papeteries is small, but their production is considerable. Trade directories indicate papeteries are manufactured by approximately 70 converters located in 20 States. More than 50 percent of these are concentrated in the Northeastern States. Data published by the Census show more than 50,000 tons of domestically produced paper were converted to papeteries in 1943. This is estimated to be two or three times the volume of prewar production and is attributed to the great increase in personal correspondence conducted during the war.

PAPETERIES-Continued

Imports of papeteries have, by value, amounted to less than 1 percent of domestic consumption. The sale of imported papeteries is based upon, and subject to, the vagaries of style and fashion. Austria was one of the principal foreign sources of papeteries prior to 1938.

Exports of papeteries have usually exceeded imports in the past but have not, by value, represented more than 1 percent of domestic production. The principal export markets are Canada, the Philippine Islands, and Cuba.

PAPER ENVELOPES, FILLED OR UNFILLED

Stat. import classes (1408): 479.1, 479.2, 479.3 ^{a/}

United States production, exports, and imports, 1937-39 and 1943

Year	Production	Domestic exports	Imports for consumption from--				
			All countries	Canada	UNITED KINGDOM	France	Japan
			Quantity (pounds)				
1937	Not avail- able	962,416	24,307	4,943	6,268	3,985	2,847
1938		960,559	21,834	5,458	3,512	3,697	4,506
1939		1,078,572	16,891	5,775	2,267	3,460	2,472
1943		1,140,074	2/ 11,615	9,855	1,507	-	-
			Value (dollars)				
1937	48,523,793	174,769	9,876	1,679	3,240	2,533	928
1938	n.a.	190,863	6,858	1,540	1,380	1,201	1,323
1939	50,194,653	212,240	5,631	1,621	1,251	1,024	729
1943	n.a.	1/ 312,320	2/ 5,742	3,058	2,255	-	-

1/ Includes 106,460 pounds valued at 320,695 exported under lend-lease.

2/ Includes 3,350 pounds valued at \$835 free as an act of international courtesy.

Source: Official statistics of the U. S. Department of Commerce.

Item

United States tariff

Proposed negotiating country

Act of 1930

1945 rate

Par. 1408

Paper envelopes, filled or unfilled, whether the contents are dutiable or free, not specially provided for:

	Rate on paper from which made, plus	Rate on paper from which made, plus	
If plain -----	5% ad valorem	2 1/2% ad valorem 1/	UNITED KINGDOM
If bordered, embossed, printed, tinted, decorated, or lined -	10% ad valorem 2/	5% ad valorem 1/ 2/	do.
If lithographed -----	30% ad valorem 2/	15% ad valorem 1/ 2/	do.

1/ Trade agreement with the United Kingdom, effective January 1939.

2/ The specified percentage added for each process if subjected to more than one process.

Note.- The duty on total imports of plain cut envelopes in 1939 was equivalent to 25 percent ad valorem; on bordered, embossed, printed, tinted, decorated, or lined, 32 percent ad valorem; and on lithographed, 39 percent ad valorem.

a/ The kind of paper from which these envelopes are made is indicated by adding as terminal numbers the last three digits of the class number for the particular kind of paper, e.g. 479.1242 signifies plain envelopes made from plain writing paper.

PAPER ENVELOPES, FILLED OR UNFILLED--Continued

Comment

Envelopes are made in a large number of sizes and shapes from a wide variety of papers, including writing, kraft, manila, vegetable parchment, and glassine. As indicated in the tariff, they may be plain, bordered, embossed, lined, lithographed, etc.

Data published by the Census indicate 169 establishments located in 26 States and the District of Columbia were engaged in the manufacture of envelopes during 1939. New York, Illinois, Massachusetts, Pennsylvania, and Ohio were the principal producing States. Although data for the war years are lacking, production is believed to have undergone some expansion to meet the increased military, commercial, and individual demands.

Imports of envelopes have been very small, and limited to specialties made from writing paper and similar stocks. Manufacturers abroad are unable to compete with United States manufacturers of mass-produced, low-priced envelopes which are in large demand. In 1939, envelopes tinted, bordered, embossed, etc., comprised approximately 75 percent of the total value of envelopes imported. Imports had the relatively high average value of 35 cents a pound (foreign value ex-duty) from 1937 to 1940; whereas the average value of exported envelopes was about 20 cents a pound. The basis employed for the assessment of duty on imported envelopes is the rate applicable to the paper from which the envelopes are made (i.e., writing, kraft, manila, etc.) plus 2½ percent ad valorem, if plain; plus 5 percent ad valorem for each process, if bordered, embossed, printed, tinted, decorated, or lined; and plus 15 percent ad valorem, if lithographed. Consequently, the number of possible rate combinations is large. In 1939, envelopes were entered under 14 statistical classifications with a range in rates from 3 cents a pound and 17½ percent ad valorem to 3 cents a pound and 35 percent ad valorem.

Exports of envelopes by the United States, though many times greater than imports, amounted to less than one-half of one percent of domestic production before the war. The principal markets were Canada, the Philippines, and Latin American countries. Exports to European countries have been negligible because all of the large consuming countries either possess facilities for the manufacture and conversion of paper into envelopes or have ready access to the product of nearby countries. The average value of exports from 1937 to 1940 was 19 cents a pound.

Paper envelopes, filled or unfilled: United States imports for consumption, by kinds, with principal sources, 1939

Kind	Total value	Principal sources
Plain -----	\$1,520	Japan, \$387; Germany, ¹ / ₂ \$327, UNITED KINGDOM, \$284
Bordered, embossed, printed, tinted, decorated, or lined.	3,844	Canada, \$1,461; UNITED KINGDOM, \$967; France, \$757
Lithographed -----	267	Yugoslavia, \$148; France, \$76; Canada, \$43

¹/ Includes Austria.

Source: Official statistics of the U. S. Department of Commerce.

HANGING PAPER, NOT PRINTED
(SEE DIGEST COVERING "HANGING PAPER, PRINTED")

Stat. import class (1939): 4775.0

United States production, exports, and imports, 1937-39 and 1943

Year	Production	Domestic exports ^{1/}	Imports for consumption from---			
			All countries	United Kingdom	CANADA	
			Quantity (short tons)			
1937 ----	126,890	Not avail- able	2,916	<u>2/</u>	2,916	
1938 ----	n.a.		76	-	76	
1939 ----	116,781		5	5	<u>2/</u>	
1943 ----	66,399		-	-	-	
			Value (dollars)			
1937 ----	7,785,201	Not avail- able	139,474	621	138,832	
1938 ----	n.a.		4,346	-	4,171	
1939 ----	6,943,163		1,005	998	7	
1943 ----	^{3/} 4,100,000		-	-	-	

^{1/} Believed to be negligible.

^{2/} Less than one-half ton.

^{3/} Estimated.

Source: Official statistics of the U. S. Department of Commerce except as noted.

Item

United States tariff

Proposed
negotiating
country

Act of 1945
1930 rate
Percent ad valorem

Par. 1409

Hanging paper, not printed, litho-
graphed, dyed, or colored -----

10 1/ 7½

CANADA

^{1/} Trade agreement with Canada, effective January 1939.

Comment

Hanging paper, not printed, usually called hanging stock, is made of various proportions of groundwood (mechanical pulp) and bleached or unbleached chemical wood pulp. In most instances it is made in mills which produce either newsprint or groundwood specialty papers as their principal output. It has a somewhat rough but uniform surface and is adapted to take deep embossing. The paper is soft and pliable, will take paste without curling, is usually hard-sized to resist moisture in printing, and is the base stock on which designs are printed or embossed in the manufacture of wall paper in rolls.

Hanging paper is made by about 20 concerns in the United States nearly all of which produce a variety of other groundwood papers as well. With one or two exceptions these mills are located in the Northeast and Lake States. The trend of production has been generally downward for a number of years because of the competition from other materials, such as water-soluble casein paints, as wall coverings. During the war further decreases in output were made necessary because of the increased need for pulp in making more essential papers.

Imports of hanging stock have been small for some time. In 1938 they dropped below 100 tons and ceased entirely after 1942. The Canadian mills which have been the source of nearly all of the imports are in Ontario and Quebec.

Exports of hanging stock, not separately shown in the statistics, are believed to be negligible.

HANGING PAPER, PRINTED (SEE DIGEST COVERING "HANGING PAPER,
NOT PRINTED")—Continued

Annual imports of wall paper were declining before the war. Since 1939 further marked decreases have taken place because of labor shortages in foreign producing countries and restrictions on the use of materials because of war activities. By 1944 imports had declined to less than 10 percent of the value in 1939.

Exports of wall paper from the United States have for a number of years been less than \$200,000 in value, and the trend has been downward. The principal markets are Canada, Australia, and other British dominions. Wide differences in taste and cultural background limit United States exports.

The imported product supplies a steady and somewhat exclusive market in which price has little direct influence. This market is limited by certain aesthetic factors and most imported papers are satisfactory to comparatively few consumers in the United States.

COVER PAPER

Stat. import class (1939): 479.00

United States production, exports, and imports, 1937-39 and 1943

Year	Production	Domestic exports	Imports for consumption from--				
			All countries	Germany ^{1/}	France	UNITED KINGDOM	Canada
	Quantity (short tons)						
1937	24,437	795	<u>2/</u>	-	-	<u>2/</u>	-
1938	20,216	901	<u>1</u>	<u>2/</u>	<u>2/</u>	<u>2/</u>	-
1939	19,401	833	-	-	-	-	-
1943	37,618	1,304	10	-	-	-	10
	Value (dollars)						
1937	4,435,204	256,432	62	-	-	62	-
1938	n.a.	256,674	375	317	46	12	-
1939	3,449,354	264,780	-	-	-	-	-
1943	n.a.	404,408	1,480	-	-	-	1,480

^{1/} Includes Austria. ^{2/} Less than one-half ton.

Source: Official statistics of the U. S. Department of Commerce.

United States tariff

<u>Act of</u>	<u>1945</u>
<u>1930</u>	<u>rate</u>
<u>Percent ad valorem</u>	

Proposed
negotiating
country

Par. 1409

Paper commonly or commercially
known as cover paper, plain,
uncoated, and undecorated -----

30

30

UNITED KINGDOM

Comment

Cover papers include a wide variety of papers made of rag pulp, chemical wood pulp, ground wood, or a mixture of these, and vary in weight from 25 to 110 pounds to the ream of 500 sheets 20 by 26 inches. Essential characteristics of cover papers are folding strength, permanence of color, good printing surface, and resistance to abrasion and wear. These papers are customarily used for the outside covers of books, pamphlets, and other printed matter requiring protection from wear in handling; they are also used for making photograph albums and box covers.

Production in the United States before the war ranged from 12,700 to 28,000 tons a year, but in 1944 the output increased to 44,800 tons as a result of the demand for some types and grades of this paper for war uses. The 12 concerns listed as making cover paper in the United States are, with one exception, in the Northeastern and Lake States.

Exports have ranged from 2 to 5 percent of the domestic output in quantity and have represented a slightly larger proportion of the total value. The most important foreign markets for this paper are the British possessions and the Latin American countries.

Imports of cover paper have been negligible compared with domestic production and exports.

103-104

BLOTTING PAPER

Stat. import class (1939): 479.09

United States production, exports, and imports, 1937-39 and 1943

Year	Production	Domestic exports	Imports for consumption from--			
			All countries	UNITED KINGDOM	Germany <u>1/</u>	Canada
	Quantity (pounds)					
1937 -----	23,588,000	2,911,604	6,655	4,457	1,030	379
1938 -----	<u>2/</u> 21,229,000	2,067,942	10,432	9,431	707	57
1939 -----	21,386,000	3,128,295	1,785	764	641	200
1943 -----	19,572,000	2,125,731	619	-	-	619
	Value (dollars)					
1937 -----	2,185,230	300,126	1,563	688	287	119
1938 -----	n.a.	242,891	1,556	1,233	230	42
1939 -----	1,883,147	364,536	534	235	172	75
1943 -----	n.a.	422,364	244	-	-	244

1/ Included Austria beginning 1938.

2/ Estimated.

Source: Official statistics of the U. S. Department of Commerce except as noted.

Item	United States tariff		Proposed negotiating country
	Act of	1945	
	1930	rate	
	Percent ad valorem		

Par. 1409

Blotting paper ----- 30 1/ 15 UNITED KINGDOM

1/ Trade agreement with the United Kingdom, effective January 1939.

Comment

Blotting paper is an unsized paper made of rag or cotton-linter pulp or a mixture of these and chemical wood pulp. It is soft, porous, spongy and without much strength, and its primary characteristic is absorptivity. Although it is often used where a soft and bulky paper is required, blotting paper as the name implies is used primarily for the absorption of excess ink from freshly written matter. It may be machine finished for use plain or printed, or it may be laminated on one side with a coated book paper suitable for halftones and colors. It is often used to carry advertising matter.

The production of blotting paper in the United States is by 11 mills, all in the Northeastern region. All the mills making blotting paper also produce several other types and grades of paper. The total annual domestic output of blotting paper has ranged from about 19 million to 28 million pounds for a number of years, the average since 1929 having been a little over 22 million pounds.

Imports have been very small in both quantity and value and during the war years were negligible.

Exports have represented between 10 and 20 percent of production for a number of years, the most important markets being Canada and Latin America.

FILTERING PAPER

Stat. import classes (1939): 479.61 and 479.62

United States production, exports, and imports, 1937-39 and 1943

Year	Production	Domestic exports ^{1/}	Imports for consumption from--				
			All countries	UNITED KINGDOM	Germany ^{2/}	Sweden	France
	Quantity (short tons)						
1937 -	1,435	Not avail- able	209	58	32	15	95
1938 -	n.a.		150	49	24	5	68
1939 -	1,505		171	55	24	13	74
1943 -	3,589		39	39	-	-	-
	Value (dollars)						
1927 -	385,804	Not avail- able	366,180	179,136	93,591	54,083	34,992
1938 -	n.a.		259,153	161,762	59,635	14,996	18,508
1939 -	424,927		318,384	171,031	71,089	52,583	19,047
1943 -	n.a.		180,820	180,830	-	-	-

^{1/} Exports of filter paper are believed to be considerably less than imports.^{2/} Includes Austria beginning 1938.

Source: Official statistics of the U. S. Department of Commerce.

Item	United States tariff		Proposed negotiating country
	Act of 1930	1945 rate	
Par. 1409 Filtering paper:			
Valued at less than 75¢ lb. -----	5¢ lb. + 15% ad valorem	5¢ lb. + 15% ad valorem	UNITED KINGDOM
Valued at 75¢ or more lb. -----	5¢ lb. + 15% ad valorem	2½¢ lb. + 7½% ad valorem ^{1/}	

^{1/} Trade agreement with United Kingdom, effective January 1939.

Note.- The duty on the imports in 1939 of filtering paper valued at less than 75 cents per pound was equivalent to 36 percent ad valorem. The duty on the imports in 1939 of paper valued at 75 cents or more per pound was equivalent to 8 percent ad valorem not including imports from Germany to which the trade agreement rate did not apply (including imports from Germany the ad valorem equivalent was 11 percent).

Comment

A substantial part of the imports of filtering paper for many years has consisted of paper that has been cut into discs before importation and has been valued at 75 cents or more per pound. These filtering paper discs have generally been assessed for duty by the Treasury Department under paragraph 1413 either as manufactures of paper at 35 percent ad valorem or as paper cut into shapes at 30 percent ad valorem; and it appears that few, if any, of these discs have been entered under paragraph 1409 at the lower trade agreement rate of 2½ cents per pound plus 7½ percent ad valorem. In considering the rates of duty on filtering paper, therefore, both paragraphs 1409 and 1413 should receive attention.

FILTERING PAPER-Continued

Filtering paper, customarily called filter paper, is a porous, unsized paper made of rag or chemical wood pulp or both ranging in weight from 30 to 130 pounds to the ream of 480 sheets 24 by 36 inches. Important characteristics are moderate to high strength when wet and a high degree of purity combined with a low ash content in the case of analytical filter paper. It is used for filtering solid particles from liquids or gases. The lower quality papers are used in the filtering of coffee in households and restaurants and in various industrial processes. Those of higher quality are used in analytical work in medical, chemical, and research laboratories and also in industry.

Filter paper is produced in the United States by 10 or 11 concerns, all but one of which are in the Northeastern States. The total output ranged during the 15 years before the war from about 800 to 1,500 tons annually and consisted principally of industrial papers. During the war it increased to nearly 4,000 tons and a large part of the output was special papers used in the manufacture of gas masks and other military equipment.

In 1939, as the result of the trade agreement with the United Kingdom, imports of filter paper were divided into two value brackets—paper valued at less than 75 cents per pound and paper valued at 75 cents or more per pound. Before that time the average unit value of the imports was less than \$1 a pound. In 1939 and later years by far the larger part of the total value of imports was represented by papers valued at over \$2 a pound. During the war imports from countries other than the United Kingdom practically ceased and over 75 percent of the imports from that country were valued at around \$3 a pound. Imports in 1939 of filter paper by value brackets, by principal sources are shown in the table below.

In 1944 imports of filter paper, according to official figures, amounted to about 9 tons valued at about \$11,000. As shown by the above table the reported imports in 1943 amounted to 39 tons valued at about \$180,000. The apparent decrease in imports in these 2 years compared with previous years was caused mainly by a change in the method of reporting import statistics. Before 1943 the import statistics of filtering paper included paper cut into discs; in 1943 and 1944, however, imports of discs were not included in this classification but were probably included under statistical class 474.20 (paper, etc., cut, etc., into shapes, etc.). Actual total imports in 1943 and 1944 of filtering paper including discs, according to the reports of importers, were larger than in prewar years.

Exports of filter paper are estimated as being considerably less than imports in both quantity and value. The principal foreign markets for filter paper made in the United States are Canada and Latin America.

Filtering paper: United States imports for consumption, by price groups, with principal sources, 1939

Price group	: Total : : value :	Principal sources
Valued at less than 75¢ per lb. —	\$48,913	UNITED KINGDOM, \$22,731; France, \$18,893; Japan, \$4,188; Germany, ¹ / ₃ , \$3,101
Valued at 75¢ or more per lb. —	269,471	UNITED KINGDOM, \$148,300; Germany, ¹ / ₃ , \$67,988; Sweden, \$52,583; Japan, \$446; France, \$154

¹/ Includes Austria.

Source: Official statistics of the U. S. Department of Commerce.

STENCIL PAPER, UNMOUNTED

Stat. import class (1939): 479.75

United States production, exports and imports, 1937-39 and 1943

Year	Production	Domestic exports	Imports for consumption from---			
			All countries	Germany <u>1/</u>	UNITED KINGDOM	Belgium
Quantity (pounds)						
1937 ———	Not		81,173	61,750	13,950	3,595
1938 ———	avail-	Not	80,212	50,999	17,034	12,150
1939 ———	able	avail-	61,708	34,236	17,086	10,129
1943 ———	(See text)	able	5,284	—	4,977	—
Value (dollars)						
1937 ———	Not	Not	94,274	67,731	21,021	3,753
1938 ———	avail-	avail-	91,949	56,027	23,291	12,559
1939 ———	able	able	68,536	36,084	21,553	10,670
1943 ———			6,968	—	6,685	—

^{1/} Including Austria in all years. Austria was the second source in 1937.

Source: Official statistics of the U. S. Department of Commerce.

ItemUnited States tariffProposed negotiating country

Act of	1945
1930	rate
Percent ad valorem	

Par. 1409

Paper not specially provided for:

Stencil paper, unmounted

30

30

UNITED KINGDOM

Comment

Stencil paper is a strong, long-fibered, unsized tissue processed by impregnating or coating for use in reproducing typed matter. Impregnated stencil paper is classified for duty purposes under paragraph 1409. Some imports of stencil paper, unmounted, have recently been held to be coated paper dutiable under paragraph 1405. Thus the present digest and the 1943 import statistics in the foregoing table do not cover all the imports of unmounted stencil paper. However, the imports which have been held to be coated rather than impregnated seem to have been small.

The basic paper used in the production of stencil paper is classified for assessment of duty as tissue paper, n.s.p.f., under paragraph 1404. The rates at present in effect on such paper range from $2\frac{1}{2}$ cents a pound plus $7\frac{1}{2}$ percent ad valorem to 6 cents per pound plus 20 percent ad valorem, depending upon the weight per ream and the value per pound. The rate of 6 cents plus 20 percent is probably the significant one as regards such amounts of basic stencil paper as have been imported in recent years. (Information on the volume of imports of basic paper is not available since such imports are reported along with several other varieties of tissue paper, n.s.p.f.)

The basic paper used for this purpose is a specialty product manufactured by only 4 or 5 paper mills in the United States. The paper is sold to converters who impregnate, cut, mount, and package it for distribution. Some converters in this country import and mount previously impregnated paper or import the basic paper and process it. It is estimated that there are between 5 and 10 converters of this type of paper, mostly located in industrial centers of Northeastern and Midwestern

STENCIL PAPER, UNMOUNTED - Continued

states. Two of the largest producers are also leading manufacturers of mimeograph and duplicating machines. The techniques and formulae involved in the impregnating or coating of stencil paper are protected by patents. During the war, United States production was increased sufficiently to replace the amount normally imported and to satisfy the expanded war-time demand.

Comparable production data for the United States are not available, but it is estimated that imports of impregnated paper represented possibly 5 percent of domestic consumption before the war. Total imports have steadily decreased since 1934 when they were first separately classified, but imports from the United Kingdom increased until the outbreak of the war. Austria was an important foreign source of supply prior to 1938.

PAPERS, NOT SPECIALLY PROVIDED FOR

Par. No. 1409
UNITED KINGDOM

Stat. import class (1939): 479.79

United States production, exports, and imports, 1937-39 and 1943

Year	Production	Domestic exports <u>1/</u>	Imports for consumption from--				
			All countries	Japan	UNITED KINGDOM	Finland	France
	Value (dollars)						
1937	See text	200,000	173,747	77,216	20,673	15,266	22,702
1938		100,000	76,326	36,538	10,154	7,984	3,087
1939		150,000	75,463	26,847	17,895	12,128	8,733
1943		250,000	<u>2/</u> 134,116	246	6,199	-	-

1/ Estimated. 2/ Includes \$126,802 imported from Canada.

Source: Official statistics of the U. S. Department of Commerce.

<u>Item</u>	<u>United States tariff</u>		<u>Proposed</u> <u>negotiating</u> <u>country</u>
	<u>Act of</u> <u>1930</u>	<u>1945</u> <u>rate</u>	
	<u>Percent ad valorem</u>		
Par. 1409			
Paper not specially provided for ----	30	30	UNITED KINGDOM

Comment

Papers not specially provided for include a few miscellaneous papers customarily made for a particular purpose and having a special finish or containing an uncommon component raw material.

Production of these papers in the United States is not separately shown in statistics, but they include special wrapping papers, fine, decorative, or utility papers of various weights, colors, and finishes. Mills making a variety of papers over any yearly period usually produce one or more such papers on order. The total domestic output of these unspecified papers probably ranges from 2 to 3 million dollars a year.

Imports of such papers before the war were largely for special uses, such as calendar roll paper, tea wrapping paper, backing paper, punching paper, and alder-pith paper from Taiwan used for water-color painting and other decorative purposes. The trend of these imports was gradually downward, but during the war rose substantially owing to increased imports of certain papers from Canada for war uses.

Exports are estimated to have averaged 6 or 8 percent of production before the war, the principal markets being Canada and Latin America.

BOOKS AND PAMPHLETS, NOT SPECIALLY PROVIDED FOR

Stat. import classes (1939): 951.00, 951.01, 951.40-.44, 951.50-.54,
953.10, 0699.51, 0699.55

United States production, exports, and imports, 1937-39 and 1943

Year	Production <u>1/</u>	Domestic exports	Imports for consumption <u>2/</u> from--			
			All countries	UNITED KINGDOM	BELGIUM	Germany <u>3/</u>
	Value (1,000 dollars)					
1937 ---	168,217	6,504	2,150	1,524	149	145
1938 ---	n.a.	6,466	1,984	1,397	173	131
1939 ---	164,380	5,929	1,786	1,213	197	120
1943 ---	306,379	7,943	858	755	-	<u>4/</u>

^{1/} Statistics for 1937-39 consist of books and pamphlets printed and published or published only; direct mail books and pamphlets are not included. Data for 1943 represent books sold, and are not directly comparable with other years.

^{2/} Data do not include imports of books in parcel post packages of a value less than \$100. ^{3/} Includes Austria beginning 1938. ^{4/} Less than 500.

Source: Official statistics of the U. S. Department of Commerce.

Item	United States tariff		Proposed negotiating country
	Act of	1945	
	1930	rate	
	Percent ad valorem		
Unbound and bound books, sheets, or printed pages of books bound wholly or in part in leather, pamphlets, and music in books and sheets:			
If of bona fide foreign authorship:			
Prayer books, and sheets or printed pages of prayer books -	15	^{1/} 7½	BELGIUM
Other (except diaries) -----	15	^{2/} 7½	UNITED KINGDOM
If of other than bona fide foreign authorship:			
Prayer books, and sheets or printed pages of prayer books -	25	^{1/} 12½	BELGIUM
Other (except diaries) -----	25	^{2/} 20	UNITED KINGDOM
Books for children's use -----	15	15	UNITED KINGDOM
Books of domestic manufacture, exported and returned in improved condition -----	^{3/}	^{3/}	UNITED KINGDOM
Bookbindings, wholly or in part of leather -----	30	^{2/} 15	UNITED KINGDOM
Book covers, wholly or in part of leather -----	30	30	UNITED KINGDOM

^{1/} Trade agreement with Belgium, effective May 1935, provided rate by virtue of first proviso of par. 1404 shall not exceed 3 cents per pound and 10 percent.

^{2/} Trade agreement with United Kingdom, effective January 1939.

^{3/} Respective rates on books apply to value of improvements.

BOOKS AND PAMPHLETS, NOT SPECIALLY PROVIDED FOR--Continued

Comment

The books, pamphlets, and music covered by the dutiable provisions of the tariff here considered are exclusive of Bibles, and must be printed in English, be not more than 20 years old, and be imported under conditions of general trade (i.e., exclusive of those which are specially imported for the Government, or for educational, religious, and similar institutions); otherwise they are duty free.

Dutiable imports may be either bound or unbound, the latter including flat, folded, and gathered, or sewed sheets. Leather bindings are dutiable as such whether they are imported separately or as part of bound volumes; in the latter circumstance, the pages or printed part are dutiable at the appropriate book rate. Book covers, as distinguished from bindings, are loose interchangeable coverings for protecting books. Children's books here considered are those weighing less than 24 ounces each, and containing reading matter. Related books without reading matter are provided for in paragraph 1513 as toy books. The distinction in rates according to character of authorship applies to books, pamphlets, music, and the dutiable value of repaired domestic books, but not to bindings, covers, or children's books. Diaries were excepted from the concession in the trade agreement with the United Kingdom, effective January 1943.

Under the provisions of the Copyright law, books (whether by American or foreign authors) which are protected by United States copyright must be printed in the United States from plates made or type set in the United States. This requirement, which is not related to the tariff, is of greater significance in restricting imports of books than the tariff rates.

The domestic book industry in 1939 comprised 1,396 establishments engaged in publishing only, printing only, or both publishing and printing. Employees numbered about 43,000. The most important centers were New York, Illinois, Massachusetts, Pennsylvania, and Ohio. In recent years the publication of books in the United States has widely expanded, partly because of wartime stimulation, but also because of increased demands for general educational books and more widespread reader interest. Production data in the table above include Bibles and other works covered by free list provisions, but the great bulk consists of material covered by the dutiable provisions. However, a very large part of the total consists of copyrighted titles which could not be imported if printed abroad. The value of production is that of published works (in 1943 of books sold); the value of printing, or of books "manufactured" is, of course, smaller.

Imports are virtually limited to books (in English) which have never been copyrighted in the United States and those on which copyrights have expired. Imports of books of other than foreign authorship consist in part of works of American authors on which the copyright has expired, and of books containing instructions and directions which are not definitely of foreign authorship. Those of foreign authorship are chiefly works which have never been copyrighted in the United States, both classical and modern. The reason for this is that the copyright privilege was first extended to nonresident foreign authors in 1891, and the earliest works considered of sufficient importance to be copyrighted for the full term of 56 years will not become eligible for importation prior to 1947. Modern uncopyrighted imports include works for which there may be an immediate but passing demand or those for which there is a continuous demand in relatively small volume that can be supplied from foreign stocks more readily than by printing an American edition.

Direct competition between domestic and imported books is confined substantially to those on which the copyright has expired and to noncopyrighted classics. In these fields, the same titles usually are published both here and abroad, and imports serve the same literary requirements as domestic works. In some instances the imported books may be special editions or bindings which have an appeal

BOOKS AND PAMPHLETS, NOT SPECIALLY PROVIDED FOR--Continued

beyond the literary aspect. Imports in the field of modern works generally consist of titles which are not published here, and, therefore, supplement the domestic output. Some modern works, however, such as reference and scientific books, may treat of the same subjects as domestic publications, and in this way offer some competition. Imported prayer books in large measure consist of books pertaining to one religious denomination, and thus compete with domestic output in a more limited field than is the case with books in general. Some domestic prayer books are copyrighted; nevertheless, because of the similarity of subject matter, imports may readily compete with them. To a large extent, books of foreign origin are imported and distributed in the United States by concerns which also publish domestic books. The publisher of domestic books (unless also engaged in printing) is, therefore, less directly affected by import competition than the printing (or manufacturing) end of the American book industry. (Imports of books and pamphlets, n.s.p.f., by kinds, in 1939, are shown in the table below.)

Exports of books have usually exceeded imports in value, and ranged from 3 to 5 percent of production. Canada is the principal market, but the Philippines, United Kingdom, Australia, Argentina, and Brazil were also important markets. Some new markets developed during the war in non-English-speaking countries may continue in postwar years.

Books and pamphlets, not specially provided for: United States imports
for consumption, by kinds, with principal sources, 1939

Kind	Total value	Principal sources
Books, pamphlets, music, n.s.p.f.::	:	:
Of bona fide foreign authorship::	:	:
Prayer books, of India or Bible paper -----:	-	:
Prayer books, other -----:	\$131,540	BELGIUM, \$109,561; Germany, ¹ / ₃ \$10,451; Czechoslovakia, \$5,516
Other books (except diaries) -:	1,367,906	UNITED KINGDOM, \$1,090,964; Germany, ¹ / ₂ \$61,625; Belgium, \$54,459
Pamphlets -----:	28,545	UNITED KINGDOM, \$13,720; France, \$3,893
Music in books and sheets ----:	120,126	UNITED KINGDOM, \$54,511; Germany, ¹ / ₂ \$37,505
Of other than bona fide foreign authorship:	:	:
Prayer books, of India or Bible paper -----:	-	:
Prayer books, other -----:	22,206	BELGIUM, \$17,791; Czechoslovakia, \$2,772
Other books (except diaries) -:	35,048	UNITED KINGDOM, \$18,331; Japan, \$6,553
Pamphlets -----:	3,349	France, \$848; Sweden, \$560; Belgium, \$516; UNITED KINGDOM, \$403
Music in books and sheets ----:	1,324	Canada, \$694; Germany, ¹ / ₂ \$595; UNITED KINGDOM, \$31

See footnote at end of table.

BOOKS AND PAMPHLETS, NOT SPECIALLY PROVIDED FOR--Continued

Books and pamphlets, not specially provided for: United States imports
for consumption, by kinds, with principal sources, 1939--Continued

Kind	Total value	Principal sources
Books, domestic, exported and returned in improved condi- tion:		
Of bona fide foreign author- ship -----	\$120	UNITED KINGDOM, \$120
Of other than bona fide foreign authorship -----	-	
Books for children's use -----	14,915	UNITED KINGDOM, \$9,068; Japan \$2,987
Bookbindings, wholly or in part) of leather)-	60,844	UNITED KINGDOM, \$24,084; Italy, \$18,993; Belgium, \$13,737
Book covers, wholly or in part) of leather)		

1/ Includes Austria.

Source: Official statistics of the U. S. Department of Commerce.

PRINTED VIEWS OF AMERICAN SCENES (EXCEPT POST CARDS)

Stat. import classes (1939): 951.05 and 951.06

United States production, exports, and imports for consumption, 1935, 1938-39, and 1943

Year	Production	Domestic exports	Imports
1935			3/\$186
1938	Not	Not	-
1939	avail-	avail-	-
1943	able 1/	able 2/	-

1/ Probably substantial. 2/ Probably small. 3/ All from Switzerland.
Source: Official statistics of the U. S. Department of Commerce.

Item	United States tariff		Proposed negotiating country
	Act of 1930	1945 rate	

Par. 140

Views of any landscape, scene, building, place or locality in the United States, on cardboard or paper, by whatever process printed or produced, including those wholly or in part produced by either lithographic or photogelatin process (except show cards and post cards):

Not thinner than 8/1000 of 1 inch, occupying 35 square inches or less of surface per view -----	15¢ lb.+ 25% ad val.	15¢ lb.+ 25% ad val.	UNITED KINGDOM
Thinner than 8/1000 of 1 inch -----	\$2 per thousand	\$2 per thousand	UNITED KINGDOM

Comment

Prints, or pictures, of American scenes are produced to some extent by all printing and photographic processes, and are used for decorative, artistic, educational, and patriotic purposes, as souvenirs, and for advertising. This classification is limited to such prints or pictures (other than post cards or show cards) which are not larger than 35 square inches in area.

American-view post cards are dutiable under the same tariff provision, but are separately classified in import statistics, and are not considered herein (See digest on post cards, paragraphs 1406-1410). Show cards and other views of American scenes larger than 35 square inches in area are subject to still other tariff provisions according to kind of paper or process of printing and are not here considered.

PRINTED VIEWS OF AMERICAN SCENES (EXCEPT POST CARDS)-Continued

There is undoubtedly a large output of views or pictures of American scenery by the several branches of the domestic printing industry, including some types which if they were imported would come within this classification. Statistics of production of such types, however, are not available.

No imports have been recorded since 1935, when they amounted to 198 pounds, valued at \$186. Exports are not reported separately but are probably a negligible factor in the trade.

MAPS, CHARTS, BLANK BOOKS, ENGRAVINGS, DRAWINGS, Par. No. 1410
 PHOTOGRAPHS, AND ETCHINGS UNITED KINGDOM
 (Except diaries, note books, and address books)

Stat. import classes (1939): 951.30, 951.31

United States production, exports, and imports, 1937-39 and 1943

Year	Production	Domestic exports <u>1/</u>	Imports for consumption from--				
			All countries	UNITED KINGDOM	Germany <u>2/</u>	France	Japan
Value (dollars)							
1937	<u>3/</u> 61,592,871	105,402	<u>4/</u> 313,988	80,912	51,999	22,305	108,259
1938	n.a.	114,145	<u>4/</u> 237,096	77,709	58,437	10,525	41,840
1939	<u>3/</u> 60,208,359	85,040	166,839	49,091	30,758	25,170	12,494
1943	n.a.	<u>5/</u> 91,001	<u>6/</u> 109,974	62,067	103	-	158

^{1/} Geographic maps and charts only. ^{2/} Includes Austria beginning 1938.

^{3/} Includes value of maps, atlases, and globe covers, products of the engraving and plate-printing industry, and value of blank book making. Data include some duplication and are not in all respects otherwise comparable with tariff classifications.

^{4/} Includes diaries, notebooks, and address books, and maps, charts, etc., containing travel information which in 1939 and later years are separately classified and not included herein.

^{5/} Includes maps and charts valued at \$2,725 exported under lend-lease.

^{6/} Free for Government use, imports valued at \$25,829, and as an act of international courtesy \$12,726, principally from Canada.

Source: Official statistics of the U. S. Department of Commerce.

Item	United States tariff		Proposed negotiating country
	Act of	1945	
	1930	rate	
	Percent ad valorem		
Par. 1410			
Blank books, slate books, engravings, maps, and charts (except note books, address books, and diaries), n.s.p.f. --	25	^{1/} 20	UNITED KINGDOM
Etchings, photographs, and drawings -----	25	25	do.
^{1/} Trade agreement with United Kingdom, effective January 1939.			

Comment

Maps, charts, blank and slate books, drawing, engravings, photographs, and etchings covered by the dutiable provisions of paragraph 1410 are virtually restricted to those produced by commercial processes and imported under general trade conditions for sale. Drawings, etchings, and engravings which are works of art are provided for in paragraph 1547 or on the free list: free list provisions also apply to maps, charts, engravings, photographs, and etchings more than 20 years old, those imported for the United States or the Library of Congress, or imported by educational, religious, and similar institutions for their own use and not for sale. Other dutiable articles of paragraph 1410 considered in other digests are: (1) Maps, charts, engravings, photographs, and etchings containing additional text regarding tourist information; these are statistically classified with tourist literature of other than foreign authorship. (See digest on printed matter, n.s.p.f., par. 1410); and (2) diaries, note books, and address books.) (See digest on these items, par. 1410.)

MAPS, CHARTS, BLANK BOOKS, ENGRAVINGS, DRAWINGS,
PHOTOGRAPHS, AND ETCHINGS--Continued

Charts are usually geographic in character, but other kinds, such as color charts, are covered in this digest. Photographs, in addition to the articles commonly so known, include certain types of color prints in the production of which photo-chemical means are employed. Blank books is a term sometimes used to designate ruled books used for accounting and record purposes, but it is also commonly used to describe smaller or less formal types of books made of blank or ruled pages, and usually sold through the stationery trade.

A break-down of domestic production for 1939 shows the following groupings, which include some items not covered by this digest: (1) atlases, globe covers, and maps (\$8,282,811); (2) products of the engraving and plate printing industry (\$24,912,824); and blank book making (\$27,012,724). On the other hand, the total does not include certain items on which data are not available, such as photographs commercially produced; this item is undoubtedly large. Wartime requirement for maps and charts, both military and civilian, probably resulted in a substantial increase in domestic output, and boundary changes resulting from the war will likely mean continued high demand for new maps and charts.

Imports are less than one-half of 1 percent of domestic production. They consist largely of maps, charts, photographs, and etchings of a greatly diversified character. Etchings, drawings, and blank books under this provision (for a break-down of imports by kind and sources in 1939, see table below) represent a minor part of the total imports. The nature of the imports indicates that they are in the main of a different character from, and not competitive with, domestic products. Maps and charts are an exception, however, as there are imported some maps, globe covers, and charts, both mounted and unmounted, which are adapted to uses which bring them into competition with domestic articles.

Exports of geographic maps and charts only are shown in the table above. Canada is the principal market, but there are some exports to many countries. Exports of the other items discussed herein are not separated in statistics, but exports of blank books and photographs are probably substantial.

Maps, charts, blank books, slate books, engravings, etchings, and drawings:
United States imports for consumption, by kind, with
principal sources, 1939

Kind	Total value	Principal sources
Maps, charts, blank books, slate books, engravings, n.s.p.f. (except diaries, note books, and address books) -----	\$78,721	UNITED KINGDOM, \$27,938; Germany, ^{1/} \$19,904; Japan, \$10,648; Canada, \$4,959; France, \$3,510
Etchings, photographs, and drawings (except post cards and works of art) -----	88,118	UNITED KINGDOM, \$21,153; France, \$21,660, Denmark, \$11,511; Germany, \$10,854; Canada, \$6,288

^{1/} Includes Austria.

Source: Official statistics of the U. S. Department of Commerce.

DIARIES, NOTEBOOKS, AND ADDRESS BOOKS

Stat. import class (1939): 951.32

United States production, exports, and imports, 1939 and 1943

Year	Production	Domestic exports	Imports for consumption from—			
			All countries	Japan	UNITED KINGDOM	
Quantity (number)						
1939 ———	Not avail- able <u>1/</u>	Not avail- able	592,092	539,139	47,990	
1943 ———			66,913	—	65,730	
Value (dollars)						
1939 ———	Not avail- able <u>1/</u>	Not avail- able	34,250	20,950	12,603	
1943 ———			21,257	—	21,195	
Unit value (each)						
1939 ———	Not avail- able <u>1/</u>	Not avail- able	\$0.06	\$0.04	\$0.26	
1943 ———			.32	—	.32	

1/ Production is many times larger than imports but is not reported separately.
Source: Official statistics of the U. S. Department of Commerce.

<u>Item</u>	<u>United States tariff</u>		<u>Proposed</u> <u>negotiating</u> <u>country</u>
	<u>Act of</u> <u>1930</u>	<u>1945</u> <u>rate</u>	
	<u>Percent ad valorem</u>		
Par. 1410			
Diaries, note books, and address books -----	25	25	UNITED KINGDOM

Comment

The books here considered range in size and quality from small pocket sizes and books with paper or other cheap covers to large-sized books made of good paper and with expensive bindings.

Approximately 60 domestic concerns are listed in trade directories as producers of diaries, address, and memorandum books, most of them producing such articles together with other products. Statistics of production of the classes of books here considered are not reported separately in Census statistics; they are included with the statistics of production of other blank books. The total output of blank books of all kinds is very large.

Prewar imports consisted very largely of low-priced diaries and pocket-size note and address books produced in Japan and usually distributed in the United States through chain stores. Imports from the United Kingdom consist in part of steno-graphers note books, and in part of high grade diaries, note, and address books

DIARIES, NOTE BOOKS, AND ADDRESS BOOKS - Continued

which are distributed through the better class stationery, department, and gift stores. Imports of both types are competitive with domestic products.

There are some exports of diaries,note, and address books, but they are not separately reported and the total value is probably small.

Stat. import classes (1939): 953.00 and 953.01

United States production, exports, and imports, 1937-39 and 1943

Year	Production	Domestic exports	Imports for consumption from--				
			All countries	Germany ^{1/}	Italy	Canada	UNITED KINGDOM
1937 1938 1939 1943	Quantity (pounds)						
	Not avail- able ^{2/}	Not avail- able ^{3/}	9,457 13,178 8,752 270	5,633 9,435 6,291 -	2,231 944 1,537 -	566 147 359 162	194 2,312 32 103
	Value (dollars)						
	Not avail- able ^{2/}	Not avail- able ^{3/}	5,114 7,114 4,565 3,380	3,045 5,021 3,145 -	1,382 962 870 -	176 31 393 204	93 1,030 18 3,176

^{1/} Includes Austria beginning 1938.^{2/} See text.^{3/} Probably small or negligible.

Source: Official statistics of the U. S. Department of Commerce.

ItemUnited States tariffProposed negotiating country

<u>Act of</u>	<u>1945</u>
<u>1930</u>	<u>rate</u>
<u>Cents per pound</u>	

Par. 1410

Booklets, printed lithographically or otherwise, n.s.p.f. -----

7

7

UNITED KINGDOM

Booklets, wholly or in chief value of paper, decorated in whole or in part by hand or by spraying, whether or not printed, n.s.p.f. -----

15

15

UNITED KINGDOM

Note.- The duty of 7 cents per pound on the imports in 1939 of printed booklets was equivalent to 13 percent ad valorem. The duty of 15 cents per pound on the imports in 1939 of hand decorated booklets was equivalent to 32 percent ad valorem.

Comment

Booklets, as usually understood by the trade, are articles used for greeting, souvenir, or memorial purposes, made up of several leaves or inserts fastened within a folder by means of a cord, ribbon, or similar fastener. Greeting cards in the form of booklets are not covered herein; they are specifically provided for in the tariff act and covered by another digest.

Statistics of domestic production of booklets are not available, but the output is probably substantial, and largely concerns in the printing, lithographing, and greeting card industries. The domestic output, however, of booklets identical in use with those imported is probably small.

Imports are chiefly printed booklets, as imports of the hand decorated type are negligible. Normally, the printed booklets consist in large part of forms for use as baptismal, confirmation, and similar certificates, imported from Germany and England. Imports in 1943 from the United Kingdom consisted of products having an unusually high unit value. United States exports of booklets are not separately recorded, but are probably not of importance in the trade.

PLAYING CARDS

Par. No. 1412
UNITED KINGDOM

Stat. import class (1939): 951.03

United States production, exports, and imports, 1937-39 and 1943

Year	Pro- duction <u>1/2/</u>	Domestic exports	Imports for consumption from--			
			All countries	Spain	UNITED KINGDOM	Hungary
Quantity (packs)						
1937 -----	43,000,000	3,221,916	35,846	7,968	18,404	1,440
1938 -----	44,300,000	2,624,265	49,612	1,440	36,926	5,040
1939 -----	48,200,000	3,347,409	30,193	10,117	6,184	4,777
1943 -----	70,000,000	1,949,261	3/ 67,697	6,528	-	-
Value (dollars)						
1937 -----	Not avail- able	309,673	11,984	1,478	7,785	234
1938 -----		283,243	15,812	333	13,426	699
1939 -----		310,663	8,489	2,534	2,372	1,076
1943 -----		268,499	3/ 17,232	2,736	-	-

1/ Estimated on the basis of sales of excise tax stamps shown in the annual report of the Commissioner of Internal Revenue.

2/ Fiscal years ending June 30.

3/ Free for Government use, 15,496 packs valued at \$2,764 and free as an act of international courtesy, 11,454 packs valued at \$4,212 imported from Canada; also included 19,364 packs valued at \$5,898 dutiable imports from Argentina.

Source: Official statistics of the U. S. Department of Commerce, except as indicated.

Item	United States tariff		Proposed negotiating country
	Act of 1930	1945 rate	
Par. 1412			
Playing cards -----	10¢ per pack + 20%	10¢ per pack + 10% <u>1/</u>	UNITED KINGDOM

1/ Trade agreement with the United Kingdom, effective January 1939.

Note.- The duty of 10 cents per pack plus 10 percent ad valorem on playing cards was equivalent on total imports in 1939 to 46.5 percent ad valorem or to \$0.127 per pack.

Comment

Playing cards are lithographically printed on high-grade flexible cardboard which has been coated or glazed and, in the case of the higher price packs, treated to make them water-resistant. In recent years plastic material, chiefly cellulose acetate, also has been utilized as the basic stock.

Approximately 12 domestic concerns located in Illinois, Minnesota, New Jersey, New York, and Ohio manufacture playing cards; a substantial part of the production is by one concern. A small part of the output represents cards of special designs for clubs, railroads, and steamship lines for sale to their patrons. Average annual production in prewar years is estimated at about 45 million packs. The output increased substantially during the war years to meet the demands of millions in the armed forces.

Imports are exceedingly small relative to either production or exports. The United Kingdom has been the principal source of imports and the average unit value of imports from that country is greater than that of imports from other countries.

PLAYING CARDS-Continued

Part of the imports are cards of different types from those manufactured in the United States and are used for playing the games common among the peoples of the Old World.

Exports normally have been equivalent to 5 percent or more of United States production. British India, Burma, British Malaya, the Union of South Africa, and China are the principal markets for exports from this country.

Each deck of imported and domestic made cards for sale in the United States must have affixed a 13-cent excise stamp. Cards exported are exempt of the excise tax.

PAPER BOARD AND PULPBOARD, FINISHED, INCLUDING BEER MAT BOARD

Stat. import classes (1939): 474.18 and 474.19

United States production, exports, and imports, 1937-39 and 1943

Year	Production	Domestic exports	Imports for consumption from--				
			All countries	CANADA	Sweden	Finland	Germany ^{1/}
	Quantity (1,000 pounds)						
1937	See text	Not avail-able	4,050	1,613	719	1,525	20
1938			3,261	1,618	774	849	1
1939			3,410	1,950	638	783	1
1943			4,234	4,234	-	-	-
	Value (dollars)						
1937	See text	Not avail-able	108,754	31,324	33,778	24,572	14,362
1938			94,245	31,475	39,561	15,079	6,755
1939			87,774	39,646	27,182	12,660	6,399
1943			133,643	133,643	-	-	-

^{1/} Includes Austria beginning 1938.

Source: Official statistics of the U. S. Department of Commerce.

ItemUnited States tariffProposed negotiating countryAct of
19301945
rate

Par. 1413

Paper board and pulpboard, including cardboard and leatherboard or compress leather, plate finished, supercalendered or friction calendered, laminated by means of an adhesive substance, coated, surface stained, or dyed, lined or vat-lined, embossed, printed, or decorated or ornamented in any manner, except pulpboard in rolls for use in the manufacture of wall-board -----

30% ad val. \$14.50 short ton but not less than 15% nor more than 30% ad val.^{1/}

CANADA

^{1/} Trade agreements with Sweden, effective August 1935, and with Finland, effective November 1936.

Note.- The duty of \$14.50 a short ton but not less than 15 percent nor more than 30 percent ad valorem on processed paper board and pulpboard was equivalent on total imports in 1939 to 25 percent ad valorem or \$13.04 a short ton.

Comment

The two import classes of finished paper board and pulpboard here considered include various types of base stocks made into pulpboard, fiber board, container board, trunk and panel board, and lamp shade board laminated, printed, stained, or coated with varnish, lacquer, luminous or chemical preparations, with or without embossing, and also beer mat board if stippled, varnished, or otherwise processed.

PAPER BOARD AND PULPBOARD, FINISHED, INCLUDING BEER MAT BOARD--Continued

These are used for further conversion or for special purposes, some of which may be indicated by their names.

Domestic output of these boards before the war probably averaged around 10 to 12 million dollars a year, and was widely scattered, principally throughout New England and the Lake States. The number of concerns in this branch of the industry, including those making, in addition, boards and papers of other types, is well over 100.

Imports during the decade before the war ranged from \$35,000 to \$85,000 in annual value, the bulk of the material being of low unit value. The article of greatest importance was X-ray screens having a special fluorescent coating. These came from Germany. During the war the imports of lower valued board increased in value because of the demand for these for war uses. Beer mat board with a stippled or varnished surface for use in making coasters was given a separate classification in 1939, but no imports of this board are of record in any year.

Statistics covering exports of these boards are not available, but it is estimated that these have been greater than imports. The largest markets for several types of finished or specially-surfaced pulpboards and container boards have been in Latin America.

PAPERS AND PAPERBOARD, ETC., EMBOSSED, CUT, ETC.,
NOT SPECIALLY PROVIDED FOR

Stat. import class (1939): 474.20

United States production, exports, and imports, 1937-39 and 1943

Year	Production	Domestic exports	Imports for consumption from--				
			All countries	Germany ^{1/}	United Kingdom	CANADA	Japan
	Quantity (1,000 pounds)						
1937	Not	Not	583	63	13	360	24
1938	avail-	avail-	319	89	11	212	1
1939	able	able	263	39	17	176	15
1943	(see text)	(see text)	1,054	-	107	938	2
	Value (1,000 dollars)						
1937	Not	Not	32	10	3	8	6
1938	avail-	avail-	21	11	2	6	^{2/}
1939	able	able	22	7	5	5	2
1943	(see text)	(see text)	278	-	218	47	1

^{1/} Includes Austria beginning 1938. ^{2/} Less than \$500.

Source: Official statistics of the U. S. Department of Commerce.

ItemUnited States tariffProposed negotiating country

<u>Act of</u>	<u>1945</u>
<u>1930</u>	<u>rate</u>
<u>Percent ad valorem</u>	

Par. 1413

Papers and paperboard and pulpboard, including cardboard and leatherboard or compress leather, embossed, cut, die-cut, or stamped into designs or shapes, such as initials, monograms, lace, borders, bands, strips or other forms, or cut or shaped for boxes or other articles, plain or printed, but not lithographed, and not specially provided for; * * *

30

30

CANADA

Comment

This classification includes a wide variety of paper, paper board, and pulpboard, embossed, cut, die-cut, or stamped into designs or shapes for a particular use. Among these specialties and novelties are some which are protected by patents.

Products of the type considered here are manufactured by several hundred converters located throughout the United States, with a marked concentration in the northeastern States. United States production data are not strictly comparable with data for imports and exports. However, in 1939, the value of "die-cut paper and paperboard and converted paperboard" produced in the United States was in excess of 25 million dollars.

PAPERS AND PAPERBOARD, ETC., EMBOSSED, CUT, ETC.,
NOT SPECIALLY PROVIDED FOR--Continued

Imports, consisting of box covers, top inserts, calender-roll paper, unassembled folding cartons, and similar products, including some items for which there is no counterpart produced in this country, have, by value, been equal to a small fraction of one percent of domestic production. The sharp increase in 1943 of imports from the United Kingdom is the result of a change by Customs in the classification of filter paper when cut in the form of a disc; formerly filter paper in the form of discs was entered under paragraph 1409. The rise in imports from Canada during the same year is attributed to many factors, including the great demand for paper and paper products of all kinds and the general scarcity of labor, materials, and equipment in this country.

The statistics of United States exports are not wholly comparable with statistics of imports. In 1939, the value of exports of "filing cards, index cards, and other office forms, plain or printed" amounted to approximately \$400,000. The principal export markets were Canada, the United Kingdom, and Latin American countries.

TEST OR CONTAINER BOARD

Stat. import class (1939): 474.24

United States production, exports, and imports, 1937-39 and 1943

Year	Production	Domestic exports <u>1/</u>	Imports for consumption from--			
			All countries	CANADA		
	Quantity (1,000 pounds)					
1937 ---	5,452,476	n.a.	63	63		
1938 ---	n.a.	n.a.	-	-		
1939 ---	5,924,504	85,484	20	20		
1943 ---	7,413,218	<u>2/</u> 46,091	4,594	4,594		
	Value (dollars)					
1937 ---	117,537,533	n.a.	1,491	1,491		
1938 ---	n.a.	n.a.	-	-		
1939 ---	106,008,939	1,751,924	502	502		
1943 ---	n.a.	<u>2/</u> 1,410,316	137,005	137,005		

^{1/} Classified as "Kraft container board."^{2/} Includes 12,948 thousand pounds, valued at \$395,737 exported under lend-lease.

Source: Official statistics of the U. S. Department of Commerce.

ItemUnited States tariffProposed
negotiating
country

Act of 1945
1930 rate
Percent ad valorem

Par. 1413

Test or container boards of a bursting
strength above 60 pounds per square

inch by the Mullen or the Webb test. 20 20

CANADA

Comment

Container board is a term used to designate any board made and used for the manufacture of solid or corrugated fiber shipping containers or their parts. Test board is a shipping-container board made to meet a specified bursting or puncture test, caliper thickness, and weight. Test board may be used either as liners in built up container board or as a solid container board. The container board here under consideration may be made of Kraft or chestnut pulp alone or in combination with old paper, sulphite, or other stock. Its primary characteristics are toughness, a good surface, ability to withstand friction and snuffing, and to take scoring without breaking.

Production of these boards in the United States has been generally upward since 1929 and during the war increased even more rapidly because of military requirements. Output more than doubled from 1930 to 1944. About 100 concerns, widely scattered in all regions of the United States, make these boards, some of the larger plants also converting them into containers of various types. The major part of domestic output is made in the Southern and Mississippi Valley States and consists of Kraft and jute container board and test liners.

TEST OR CONTAINER BOARD--Continued

Imports have been insignificant in comparison with production in nearly all years for which statistics are available and have been small in comparison with exports. The large percentage increase in imports from Canada during the war was the result of the great need for container board of certain types for use in shipping war materials to the armed forces abroad.

Exports were not separately shown in the statistics before 1939. It is estimated, however, that from 1930 to 1938 exports of container boards ranged from 50 to 80 million pounds with a total value of from 1.5 to 2.3 million dollars annually. Exports increased during the war because of the inability of some of the Latin American and British Empire consumers to obtain these boards from other sources. However, because of the growth of board production in several of these countries during recent years it is probable that United States exports may again shrink to prewar volume or less.

PRESS BOARDS AND PRESS PAPER

Stat. import class (1939): 474.27

United States production, exports, and imports, 1937-39 and 1943

Year	Production	Domestic exports	Imports for consumption from---			
			All countries	UNITED KINGDOM	Germany <u>1/</u>	
Quantity (pounds)						
1937 ----	17,246,000	Not avail- able <u>2/</u>	9,541	5,632	3,909	
1938 ----	n.a.		11,888	7,250	4,638	
1939 ----	15,238,000		9,865	8,099	1,602	
1943 ----	45,164,000		-	-	-	
Value (dollars)						
1937 ----	1,521,648	Not avail- able <u>2/</u>	1,979	1,081	898	
1938 ----	n.a.		2,423	1,395	1,028	
1939 ----	1,328,645		1,909	1,535	348	
1943 ----	n.a.		-	-	-	

^{1/} Includes Austria beginning 1938.^{2/} Probably substantially larger than imports before the war.

Source: Official statistics of the U. S. Department of Commerce.

<u>Item</u>	<u>United States tariff</u>		<u>Proposed</u> <u>negotiating</u> <u>country</u>
	<u>Act of</u> <u>1930</u>	<u>1945</u> <u>rate</u>	
	<u>Percent ad valorem</u>		
Par. 1413			
Press boards and press paper -----	30	30	UNITED KINGDOM

Comment

Press board consists of relatively hard-surfaced and dense board made from rags and wood pulp in varying proportions. Press paper is a term used more or less interchangeably with press board to refer to the thinner sheets of this material.

The tariff classification under consideration covers both "genuine" and "imitation" or "index" press board. The genuine press board is used principally as insulation in transformers and circuit breakers by the electric industry and in textile finishing equipment. Imitation or index press board, a considerably cheaper product, is used principally in the production of filing guides, covers for writing tablets, and so forth.

Press board is but one of several papers and boards produced by approximately 10 paper mills located principally in the Northeastern states. Genuine and imitation press board are frequently produced in the same mill but production data are not reported separately.

Imports have been equal to a small fraction of one percent of domestic production and have consisted primarily of high-grade press board.

Export data are not available; however, exports are believed to have exceeded imports by a substantial margin prior to the war. The principal export markets were Japan and Canada.

BOXES OF PAPER, PAPIER-MACHÉ, OR PAPERBOARD, NOT SPECIALLY PROVIDED FOR

Stat. import class (1939): 4785.1

United States production, exports, and imports, 1937-39 and 1943

Year	Production	Domestic exports	Imports for consumption from--				
			All countries	UNITED KINGDOM	Japan	France	Canada
	Quantity (pounds)						
1937	Not avail- able	Not avail- able	217,574	66,834	93,276	26,332	3,994
1938			160,882	83,445	42,686	7,147	10,630
1939			n.a.				
1943			n.a.				
	Value (dollars)						
1937	1/77,945,000	(See text)	47,179	13,260	14,632	9,192	669
1938	n.a.		32,527	14,959	7,893	3,499	1,742
1939	1/73,941,000		23,310	7,001	6,046	3,814	1,783
1943	n.a.		21,975	238	-	-	18,195

1/ Set-up paper boxes.

Source: Official statistics of the U. S. Department of Commerce.

<u>Item</u>	<u>United States tariff</u>		<u>Proposed</u>
	<u>Act of</u>	<u>1945</u>	<u>negotiating</u>
	<u>1930</u>	<u>rate</u>	<u>country</u>
	<u>Percent ad valorem</u>		
Par. 1413			
Boxes composed wholly or in chief value of paper, papier-maché or paperboard, and not specially provided for -----	35	35	UNITED KINGDOM

Comment

This digest deals with boxes shipped in the set-up or completed form; it excludes paper, paperboard and pulpboard which has been cut or shaped to be readily folded into boxes or other articles but which is shipped flat and enters under another provision of paragraph 1413. (See also digest covering boxes of paper, papier-maché or wood covered or lined with coated, printed, or decorated papers or covered or lined with cotton or other vegetable fiber, paragraph 1405.)

The manufacture of set-up boxes made of paper or paperboard is carried on in the United States in every large city. Long-distance shipment of set-up boxes is uneconomical, and the production of such boxes is almost wholly for concerns located near the box factories. In some instances boxes are made by the same concerns which use them as containers for their products. Boxes vary widely in style, size, material, construction and strength according to the needs to which they are put by the individual consumer.

BOXES OF PAPER, PAPIER-MACHÉ, OR PAPERBOARD, NOT
SPECIALLY PROVIDED FOR--Continued

Imports under this category consist entirely of set-up containers which are used in this country for packaging for retail distribution of various commodities, such as cosmetics, jewelry, films, and photographic paper; to a large extent the commodities so packaged are themselves of foreign manufacture. Practically all of these boxes are of small sizes and of attractive appearance, and many are of special design. The total value of such imported boxes is a small fraction of 1 percent of the value of domestic production.

United States exports of set-up boxes of the type herein considered, which also are used entirely as containers, are not shown separately in statistics; the value of such exports is estimated at from \$20,000 to \$30,000 annually, or about the same as imports.

Inasmuch as the imports of set-up boxes, particularly those from European countries, are utilized chiefly in the packaging of imported commodities, the volume of boxes brought in is influenced largely by the demand in this country for the given commodities themselves.

WALL POCKETS

Stat. import class (1939): 479.53

United States production, exports, and imports, 1937-39 and 1943

Year	Production	Domestic exports	Imports for consumption from--			
			All countries	Germany <u>1/</u>	Yugoslavia	CZECHO-SLOVAKIA
Quantity (number)						
1937 ---	Not	Not	1,224,298	-	-	1,224,298
1938 ---	avail-	avail-	575,343	28,892	-	546,451
1939 ---	able <u>2/</u>	able <u>3/</u>	279,817	261,817	18,000	-
1943 ---			-	-	-	-
Value (dollars)						
1937 ---	Not	Not	58,580	-	-	58,580
1938 ---	avail-	avail-	31,583	1,542	-	30,041
1939 ---	able <u>2/</u>	able <u>3/</u>	17,158	16,513	645	-
1943 ---			-	-	-	-

^{1/} Includes Austria beginning 1938.^{2/} Small relative to imports.^{3/} Believed to be negligible.

Source: Official statistics of the U. S. Department of Commerce.

ItemUnited States tariffProposed
negotiating
countryAct of
19301945
ratePercent ad valorem

Par. 1413

Wall pockets composed wholly or in chief value of paper, papier-mache, or paper board, whether or not die-cut, embossed, or printed lithographically or otherwise -----

35

^{1/} 35

CZECHOSLOVAKIA

^{1/} Reduced to 17½ percent ad valorem, under trade agreement with Czechoslovakia, effective from April 1938 to April 1939.

Comment

Wall pockets are made of paper board, 12 by 14 to 16 by 20 inches in dimensions, carrying an imprint in colors of a pastoral scene or a religious subject, and usually embossed and die-cut. The article gets its name from a projecting flap or pocket. Wall pockets are usually given away during the Christmas season by merchants, whose advertisement they bear, in communities having a high percentage of foreign-born persons.

Only one concern in the United States, located in an eastern State, is listed in trade directories as a manufacturer of wall pockets. Production has been of minor proportions shortly after World War I. At that time an attempt to manufacture wall pockets on a large scale was abandoned when found to be impracticable because of high costs and limited demand.

Imports are believed to supply virtually the entire domestic demand for wall pockets. Czechoslovakia succeeded Germany as the principal source of imports in 1933, when many concerns in the United States refused to use or handle German-made goods, and that country maintained this position until 1939. Following the

WALL POCKETS--Continued

transfer of the Sudetenland, wherein several of the Czechoslovakian factories were located, to Germany in 1938, Germany again became the principal source of United States supply. During the war, a small number of wall pockets was imported from Canada.

Data on United States exports are not available, but are believed to be negligible.

RIBBON FLY CATCHERS

Par. No. 1413

BELGIUM

Stat. import class (1939): 479.54

United States production, exports, and imports, 1937-39 and 1943

Year	Production	Domestic exports	Imports for consumption from--				
			All countries	BELGIUM	Nether-lands	Poland-Danzig	Germany ^{1/}
Quantity (thousands)							
1937	n.a.	n.a.	^{2/} 35,916	26,781	-	54	1,032
1938	n.a.	n.a.	39,209	34,242	65	146	490
1939	^{3/} 30,000	^{3/} 95	43,599	38,372	3,659	606	164
1943	^{3/} 60,000	n.a.	^{4/} 10,405	-	-	-	-
Value (dollars)							
1937	n.a.	n.a.	^{2/} 228,574	190,665	-	270	7,489
1938	n.a.	n.a.	218,950	200,152	253	566	2,230
1939	^{3/} 268,000	^{3/} 1,000	229,424	209,598	13,540	2,002	1,203
1943	^{3/} 730,000	n.a.	^{4/} 127,704	-	-	-	-

^{1/} Includes Austria beginning 1938.^{2/} Includes 4,395 thousands valued at \$16,596 imported from Japan.^{3/} Estimated. ^{4/} All from Canada.

Source: Official statistics of the U. S. Department of Commerce, except as noted.

Item	United States tariff		Proposed negotiating country
	Act of	1945	
	1930	rate	
	Percent ad valorem		

Par. 1413

Manufactures of paper, n.s.p.f.:

Ribbon fly catchers or fly

ribbons ----- 35 ^{1/} 27½

BELGIUM

^{1/} Trade agreement with Belgium, effective May 1935.Comment

Ribbon fly catchers are the familiar strips of paper about 1½ inches wide and 20 inches long, coated with a sticky solution, which are suspended to entrap flies.

Approximately five domestic concerns located in the North Central and North-eastern States now manufacture fly ribbons. Before 1934 there was but one domestic manufacturer, and more than 90 percent of the fly ribbons consumed in the United States were imported. In that year, two importers established factories in the United States because of unfavorable exchange and tariff rates and a threatened boycott of German-made goods. Just before the war imports supplied somewhat over 50 percent of the total number of fly ribbons consumed annually in the United States. Before 1939, Czechoslovakia and Japan ranked next to Belgium as sources of supply. Imports from Canada, the sole supplier in 1943, began coming in in 1940, but it is believed that imports from that source will be of decreasing importance.

During the war, production in the United States is believed to have approximately doubled to offset the decrease in imports and supply the civilian and military demands. Newly developed insecticides may cause a decrease in the number of fly ribbons consumed in the United States.

RIBBON FLY CATCHERS-Continued

United States exports of fly ribbons have been small in the past and will probably continue to be so in the future because European producers are in a better position to supply the world market.

Stat. import classes (1939): 953.30, 953.31, 953.32, 953.33

United States production, exports, and imports, 1937-39 and 1943

Year	Production	Domestic exports	Imports for consumption from—				
			All countries	UNITED KINGDOM	Germany <u>1/</u>	France	Belgium
Value (dollars)							
1937 -	<u>2</u> 32,636,959	Not avail- able <u>3/</u>	51,648	21,715	15,557	2,493	-
1938 -	n.a.		55,359	22,320	20,235	4,831	84
1939 -	<u>2</u> 44,286,121		35,750	17,337	4,905	3,344	2,744
1943 -	n.a.		<u>4/</u> 9,596	1,369	-	-	-

^{1/} Includes Austria beginning 1938.

^{2/} Production statistics include some duplication due to the inclusion of cards which are printed by one concern and published by another. Total also includes relatively small amounts of Christmas seals (probably not properly classified here), but does not include some types of cards which if imported would be classified under the tariff provision. ^{3/} Exports are probably somewhat larger than imports.

^{4/} Includes \$5,999 from Canada.

Source: Official statistics of the U. S. Department of Commerce.

<u>Item</u>	<u>United States tariff</u>		<u>Proposed</u>
	<u>Act of</u>	<u>1945</u>	<u>negotiating</u>
	<u>1930</u>	<u>rate</u>	<u>country</u>
	<u>Percent ad valorem</u>		
Par. 1410			
Greeting cards, valentines, tally cards, place cards, and all other social and gift cards, including folders, booklets and cutouts, or in any other form:			
With greeting, title, or other wording _____	45	45	UNITED KINGDOM
Without greeting, title, or other wording _____	30	30	UNITED KINGDOM

Greeting cards, valentines, tally, place, and other social and gift cards are associated articles that may be produced by letter press printing, lithography, engraving, or other means, either in the form of single cards, or as folders, booklets, cutouts, or more ornate styles.

In 1939 there were 109 establishments (having annual production exceeding \$5,000 each) primarily engaged in printing or publishing cards. In addition many cards were printed by concerns engaged in commercial printing. New York, Massachusetts, Illinois, Ohio, Missouri, and Pennsylvania are the principal centers of production.

Imports consist in part of cards in foreign language text, and in part of general types. The latter, largely from the United Kingdom, are high-grade cards, in many instances reproductions of famous paintings, which sell in the higher price

GREETING CARDS-Continued

levels. Imports by kinds are shown for a typical year in the table below. Imports are negligible compared with domestic production.

The processes used here and abroad for production of greeting cards are in general similar. Domestic manufacturers have evolved cards of fine designs and styles that have been copied only to a limited extent by foreign producers. The sentiments expressed are distinctively American and appeal to our taste and temperament. New designs are created seasonally. To a large extent older designs are abandoned, or they may be reprinted for sale in a lower price field. Some exports of greeting cards are made, principally to Canada, but they are not separately recorded.

Greeting cards: United States imports for consumption,
by kinds, with principal sources, 1939

Kind	: Total : : value :	Sources
Greeting cards, valentines, tally cards, place cards, and all other social and gift cards: including folders, booklets, and cutouts:	: : : : :	
With greeting, title, and other wording -----	: :\$19,602:	UNITED KINGDOM, \$12,195; Germany, ^{1/} \$4,046; France, \$575
Without greeting, title, or other wording -----	: : 16,148:	UNITED KINGDOM, \$5,142; France, \$2,769; Belgium, \$2,744; Italy, \$1,743

^{1/} Includes Austria.

Source: Official statistics of the U. S. Department of Commerce.

Stat. import class (1939): 479.06

United States production, exports, and imports, 1937-39 and 1943

Year	Production	Domestic exports	Imports for consumption from--				
			All countries	Japan	Italy	UNITED KINGDOM	Germany ^{1/}
	Value (dollars)						
1937-	Not available (See text)	Not	26,560	12,182	1,922	4,603	335
1938-		avail-	20,449	11,548	2,854	2,996	1,306
1939-		able	16,473	7,337	4,171	2,091	1,698
1943-			2/ 746	-	94	113	-

^{1/} Includes Austria beginning 1938.

^{2/} Includes imports valued at \$367 from Cuba (full duty less 20 percent) and \$115 from Canada.

Source: Official statistics of the U. S. Department of Commerce.

<u>Item</u>	<u>United States tariff</u>		<u>Proposed</u>
	<u>Act of</u>	<u>1945</u>	<u>negotiating</u>
	<u>1930</u>	<u>rate</u>	<u>country</u>
	<u>Percent ad valorem</u>		
Par. 1411			
Photograph, autograph, scrap, post-card and postage-stamp albums, and albums for phonograph records, wholly or partly manufactured.-----	30	30	UNITED KINGDOM

Comment

Albums are a type of book in either bound or loose-leaf form with blank or printed pages prepared for mounting photographs, clippings, postage stamps, post-cards, or like materials, or with envelope leaves for the insertion of disk records.

The production of albums of all types in the United States, nearly all of which is carried on in the Northeastern region by between 40 and 50 concerns, is not available separate from the statistics covering other blank books of many kinds. The total output is probably valued at several million dollars annually.

Imports have consisted principally of postage-stamp and post-card albums, the better and more expensive ones originating in the United Kingdom and the cheaper ones in Japan. The imports from Japan were designed largely for the 5- and 10-cent store trade. Compared with production, imports probably average only a small fraction of 1 percent. Many of these imports enter as unbound pages, the finished albums being made in domestic binderies. Export data are not available separate from data of other printed matter and blank books, but exports of albums probably exceed imports.

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